



***RAPIDRESEARCH***

Information is power!

## **PART ONE**

# **BUSINESS DEVELOPMENT PHASE OVERVIEW**

**CURRENT STAGE OF GROWTH**  
Strategies and Tactics to Plan Expansion

## STRATEGIC MARKETING PROGRAM CLIENT REGISTRATION PROFILE

*Provide separate notations where necessary*

1. Business Name: \_\_\_\_\_
2. Address: \_\_\_\_\_  
\_\_\_\_\_ E-mail: \_\_\_\_\_
3. Telephone No: \_\_\_\_\_ Fax No: \_\_\_\_\_ Mobile: \_\_\_\_\_
4. Owner Manager / CEO: \_\_\_\_\_ Contact Person: \_\_\_\_\_
5. Type of business: \_\_\_\_\_ Duration: \_\_\_\_\_ yrs
6. Skills or professions involved: \_\_\_\_\_  
\_\_\_\_\_ Trading Hrs: \_\_\_\_\_
7. Product Mix / Services Sold: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. Are policies / procedures written? \_\_\_\_\_
9. Nominate the main income earners: \_\_\_\_\_  
\_\_\_\_\_
10. What would be their specific characteristics? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. What are the distribution channels? \_\_\_\_\_  
\_\_\_\_\_
12. Target market: \_\_\_\_\_  
Catchment Area: \_\_\_\_\_
13. Market share: Current \_\_\_\_\_ Future \_\_\_\_\_
14. Trends \_\_\_\_\_ Raising / Falling
15. No. of customers: \_\_\_\_\_ Avg. No. of times they buy PA: \_\_\_\_\_ Avg. \$ sale: \$ \_\_\_\_\_
16. Turnover/Income Current: \_\_\_\_\_ Last year: \_\_\_\_\_ Up/Down
17. Describe the segmentation of the principle customer: \_\_\_\_\_  
\_\_\_\_\_

18. Who do you need to influence most to close a sale? \_\_\_\_\_
19. What is their role in the decision making process? \_\_\_\_\_
20. What are the needs of your principle customers? \_\_\_\_\_
- \_\_\_\_\_
21. What attracts customers to the business? \_\_\_\_\_
- \_\_\_\_\_
22. What do you sell that's unique to you and fulfill their needs? \_\_\_\_\_
- \_\_\_\_\_
23. Describe the features advantages and benefits of your principal products / services: \_\_\_\_\_
- \_\_\_\_\_
24. What image theme is projected to position the business? \_\_\_\_\_
- \_\_\_\_\_
25. Who are your main competitors? \_\_\_\_\_
- \_\_\_\_\_
26. What market share do they have? \_\_\_\_\_
27. What are you competitors characteristics? \_\_\_\_\_
- \_\_\_\_\_
28. What is your unique competitive edge? \_\_\_\_\_
- \_\_\_\_\_
29. What is done to promote the business? \_\_\_\_\_
- \_\_\_\_\_
30. Number of employees: \_\_\_\_\_ Senior: \_\_\_\_\_ Admin: \_\_\_\_\_ Frontline: \_\_\_\_\_ Family: \_\_\_\_\_
31. How are work practices and norms monitored? \_\_\_\_\_
- \_\_\_\_\_
32. Any constraints or problems to be resolved? \_\_\_\_\_
- \_\_\_\_\_

## 02 BACKGROUND INFORMATION

01. Where is your business located? (Attach a neighborhood map highlighting reference points, buildings, competitors etc.)

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02. What local events affect the community you serve? (Schedule names dates, ie. Local exhibitions, mini expos, local fairs etc.)

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03. Is your business, local ☐ Intrastate ☐ Interstate ☐ International ☐ ? Give some details ...

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04. Very briefly, what is the history of your business? \_\_\_\_\_

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05. How long have you (CEO) been involved in this field of business? \_\_\_\_\_

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06. Please identify the special events or milestone occasions what has happened in your business life? \_\_\_\_\_

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### 03 YOUR VISION FOR THE FUTURE

01. Should you have as much money as you wanted, how would you improve your Business' goods and/or services? \_\_\_\_\_

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02. What do you personally want to achieve from your business and how do you plan to do it? \_\_\_\_\_

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03. In an ideal world how much time do you want to spend at your business? \_\_\_\_\_

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04. Do you consider you work more in your business and not on it? \_\_\_\_\_

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05. What areas of your business would you like to see improved? \_\_\_\_\_

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06. What suggestions have you received from your customers and staff that you'd most like to implement? \_\_\_\_\_

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07. What do you most want to get out of this consultation with Nexus Dynamics? \_\_\_\_\_

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#### 04 YOUR FUNDAMENTAL FINANCIAL DETAILS

01.

Quick Overview	Last Year	Forecast this Year
Annual Sales Income		
<i>Less Equals</i> Cost of sales		
<i>Equals</i> Gross Profit		
<i>Less</i> Fixed expenses		
<i>Less</i> Variable expenses		
<i>Equals</i> Net profit		

02. Customer Numbers: Current \_\_\_\_\_ New Customer Target Number: \_\_\_\_\_

03. Average income per full time employee: (Include wages and salary on costs) \$ \_\_\_\_\_

04. Average amount spent on advertising and Promotion per annum: \$ \_\_\_\_\_ = \_\_\_\_\_ % of Income

05. In what areas do you spend your fixed monthly expenses? \_\_\_\_\_

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06. What areas account for your variable monthly expenses? \_\_\_\_\_

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07. What percentage of it's capability do you think your business is currently running at? \_\_\_\_\_ %

08. Currently how much more business could you handle without adding more staff or spending more on capital expenditure?

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09. What gross margins do you currently operate at? \_\_\_\_\_

10. Are these your ideal margins? How do you compare with industry standards? \_\_\_\_\_

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11. Would you want more resources & sales or do you want more sales volume from the under utilisation of resources:

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12. How involved are you with your accountant \_\_\_\_\_

13. How do you monitor your results against your objectives? \_\_\_\_\_

## 05 THE MOVERS AND SHAKERS

01. Who are the key decision makers in your business – Nominate their scope of work

Marketing

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Administration

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Production

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Distribution

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02. What training has your main team members undertaken? (be specific) \_\_\_\_\_

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03. What learning program do you have planned for them in the future? \_\_\_\_\_

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04. What would you say is really frustrating you at work? \_\_\_\_\_

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05. What would you say frustrates your team? \_\_\_\_\_

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06. What do you most like about your work? \_\_\_\_\_

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07. What does your team like most about coming to work? \_\_\_\_\_

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08. How would you describe your team and how they relate to each other?

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## 06 ABOUT YOU AND THE TEAM

01. Do you consider the business to be large, medium, small, simple, complex, specialist and why? \_\_\_\_\_

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02. How many people are in the team Full time, Part Time, Casuals, Contractors? \_\_\_\_\_

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03. Describe the special talents that any team member may have: \_\_\_\_\_

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04. As the CEO what is your background? (Training, qualifications, talents, experiences) \_\_\_\_\_

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05. Could you please draw your organisational chart. Nominate the functions and who does them *(In small business one person may fit in two or more boxes – attach a chart if not enough room)*

06. Who would be totally dedicated to the sales function? *(Full or part time)*

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07. How are these members of the sales force paid?

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## 07 THE SCOPE OF WORK

01. Do you have an Operations (procedures) Manual to show how tasks are to be done? \_\_\_\_\_

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02. How do you set job specifications? Please explain: \_\_\_\_\_

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03. Have you established the protocol and etiquette parameters for your team in how they interact with each other and more particularly how they build rapport with the customers? Please explain

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04. How often do you as CEO meet with your team? \_\_\_\_\_

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05. In what circumstances does your team meet? \_\_\_\_\_

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06. In what areas do you think your team could improve? \_\_\_\_\_

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07. Are you generating good income for doing something you love or is there a problem? \_\_\_\_\_

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08. How well do members of your team collectively relate and interact to give absolute customer satisfaction? \_\_\_\_\_

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## 08 YOUR BUSINESS DEVELOPMENT PROCESSES

01. Who and how often do managers and / or team members meet with, talk to or write to customers? (if so why and how)

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02. Do you have a customer list? Is it on a computer, if not give reasons? \_\_\_\_\_

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03. What customer tracking process or software do you use? \_\_\_\_\_

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04. Is the customer tracking software set up for mail merge and computer printer? (quality typeset) \_\_\_\_\_

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05. What client information do you systematically collect and keep? \_\_\_\_\_

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06. How is information kept up to date on the database? \_\_\_\_\_

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07. Have you categorized customers into classes A, B and C, if so what criterion is used? \_\_\_\_\_

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08. Do you have a method for clients to refer new clients to your business? \_\_\_\_\_

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09. How many of your clients do you consider to be "centers of influence" as those who advocate you and your business?

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10. Have you a system for soliciting or capturing testimonials? \_\_\_\_\_

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11. Do you use Customer Survey "happy sheets" to seek customers' critiques and complaints? \_\_\_\_\_

12. Do you get many complaints, if so what do they usually focus on? \_\_\_\_\_

13. Who receives the complaints, are they recorded and how are they handled? (*Quality Assurance Process*) \_\_\_\_\_

14. With your internal systems do all of the team members, know what each other does? \_\_\_\_\_

15. Do you have regular team meetings, if so what do you discuss? \_\_\_\_\_

16. Do you monitor performances against benchmarked ideals? If so how is it done? \_\_\_\_\_

17. How is exceptional performance monitored? \_\_\_\_\_

18. Is exceptional performance acknowledged rewarded in any way, if so how? \_\_\_\_\_

## 09 YOUR CUSTOMER PROFILE

01. How many clients do you currently serve?

Per day \_\_\_\_\_ Per week \_\_\_\_\_ Per month \_\_\_\_\_ Seasonal Trends \_\_\_\_\_

02. How many customers can be served without increasing staff?

Per day \_\_\_\_\_ Per week \_\_\_\_\_ Per month \_\_\_\_\_ Seasonal Trends \_\_\_\_\_

03. How would you describe your current typical client? (demographics – age, sex, income, occupation, education) \_\_\_\_\_

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04. How many different clients do you have? (by category if you can list them) \_\_\_\_\_

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05. How many clients are active? (buy from you on a regular basis) \_\_\_\_\_

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06. What are their personal characteristics? (i.e. their likes, dislikes, attitudes, values, lifestyle) \_\_\_\_\_

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07. What motivates people to deal with you? (eg. status, money, solutions, prices, lifestyle) \_\_\_\_\_

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08. How would you describe your most ideal customer? \_\_\_\_\_

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09. What are your ideal customers' socializing habits? (clubs, cultural groups etc.) \_\_\_\_\_

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10. How do your customers buy from you? (e.g. face to face, telephone, mail – nominate percentages) \_\_\_\_\_

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11. Where do the majority of your customers actually shop for other items that they buy? \_\_\_\_\_

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12. Are there any ways that you could tap into this location? \_\_\_\_\_

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13. How & when do you survey customers to check into their satisfaction levels and expectations? \_\_\_\_\_

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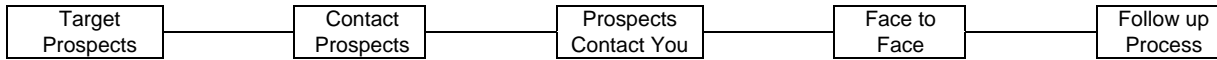
14. How do you recruit frontline staff to match the characteristics / temperament / attitudes of your clients? \_\_\_\_\_

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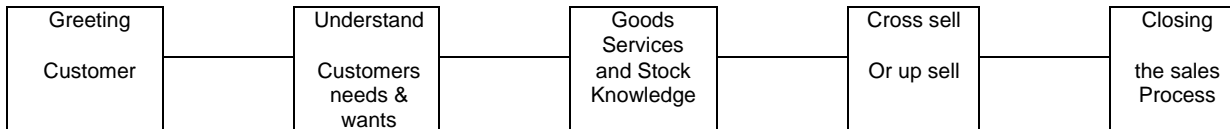
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## 10 YOUR SELLING PROCESSES

01. Outline the process you go through to attract and handle prospects (use the flowchart)



02. Outline your selling process (use the flowchart) Write out the exact words you use



03. Nominate the main features, advantages and benefits of the goods and services you sell

	Product / Service	Features	Advantages	Benefits
Eg.	Radial tyres	Steel belted	Stronger & better road holding	Safer for you and your family
01				
02				
03				
04				
05				

04. What makes you different from your competitors with what you sell and how you sell it? \_\_\_\_\_

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05. How do you acquire leads to expand your business? \_\_\_\_\_

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06. How do you qualify the leads you generate? \_\_\_\_\_

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07. Please explain your rush periods. How many people do you typically have in your / office store at one time and how many people do you have serving them?

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08. How frequently do customers purchase from you?

Per day \_\_\_\_\_ Per week \_\_\_\_\_ Per month \_\_\_\_\_ Per Year \_\_\_\_\_ Nominate the reasons why \_\_\_\_\_

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09. What paperwork and forms do you use in the sale of your product and / or services? (please include copies) \_\_\_\_\_

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10. What is your conversion rate of leads to inquiries to sales? \_\_\_\_\_%

11. How long does the average client stay with you and why? \_\_\_\_\_

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12. How much does the average client spend with you throughout their relationship or lifetime with you? \_\_\_\_\_

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## 11 YOUR BUSINESS NETWORKING AND PARTNERING POTENTIAL

01. Nominate any business associates who also target your market \_\_\_\_\_

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02. Are there businesses and associations you know of whose clients would also benefit from your range of products and services? (their customers profile is similar to your current or ideal customer)

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03. Have you ever considered or participated in a joint venture with other businesses? If so give details \_\_\_\_\_

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04. Do you have any clients on your database that you could ingratiate to your cause so that they become a "centre of influence" to promote you (or act as a reference) for your business

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05. What do you consider to be the biggest and best source of business available to you? \_\_\_\_\_

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## 12 ANALYSIS OF YOUR COMPETITIVE EDGE

Compare Strengths and Weaknesses of Competitiveness. (Yours and your competition)

	THEM		YOU	
	Hi	Lo	Hi	Lo
<b>Innovation</b>				
Technical product or service superiority	0000		0000	
New product capability and desirability	0000		0000	
R & D, patents, technologies, intellectual property	0000		0000	
The value added – cost advantage idea	0000		0000	
<b>Marketing</b>				
Product and brand, quality, reputation and usage	0000		0000	
Product characteristics / differentiation / performance	0000		0000	
Brand and business name recognition – Market share	0000		0000	
Breadth of product mix and or services capability	0000		0000	
Customer focus and orientation toward giving satisfaction	0000		0000	
Segmented customer base – loyalty/repeat business	0000		0000	
Distribution, retailer to client relationships, dealer network	0000		0000	
Quality of sales force, style and capabilities	0000		0000	
Ability to generates effective advertising and promotions	0000		0000	
Advantages of customer service / product support	0000		0000	
<b>Management</b>				
Quality of top and middle management leadership	0000		0000	
Knowledge of the business and application of acumen	0000		0000	
Business strategies, culture, values, norms and outputs	0000		0000	
Strategic plans and objectives; Synergy of team goals	0000		0000	
Staff recruitment, turnover, loyalty and recognition	0000		0000	
Quality of the decision making toward customer satisfaction	0000		0000	
Enterprise development, entrepreneurial thrust	0000		0000	
Effectiveness of the infrastructure, to repel competitive attack	0000		0000	
Structuring the ambience/environment image compatibility	0000		0000	
<b>Work Practices</b>				
Cost structures – Gross profit margins – Economics of scale	0000		0000	
Work force skills, attitudes and motivation	0000		0000	
Equipment, capacity, methodology and flexibility	0000		0000	
Access to raw materials – Purchasing – Stock storage	0000		0000	
Vertical integration / outsourcing: Source of finished goods	0000		0000	
<b>Source of Funds</b>				
Cash flow generated from operations	0000		0000	
Cash or other liquid assets provided from other sources	0000		0000	
Willingness and ability to use debt and equity financing	0000		0000	
<b>Customer Base</b>				
Size of market / segment; Catchment area and growth potential	0000		0000	
How is what you offer evaluated by its customers?	0000		0000	
How difficult would it be to dislodge loyal and happy customers?	0000		0000	
What are the costs for a customer to absorb if they switch suppliers?	0000		0000	

01 S.W.O.T. ANALYSIS SUMMARY OF SATISFACTORY CUSTOMER SERVICE

INTERNAL		EXTERNAL	
Strengths	Weaknesses	Opportunities	Threats