



3d Consulting Services

CRM Sales Pipeline Audit / Questionnaire for

Client: _____

<u>Section:</u>	<u>Score</u>
Reach:	
Referral	
Resell	
Reputation	
General	
Total Score	

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1. Reach

<p>1.1. Do you have a written marketing strategy & tactical implementation plan that you continuously apply & follow?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.2. Have you identified the sources where all (or at least most) of your business is coming from and how to stimulate more people from those specific sources to purchase from you?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.3. Do you know your allowable cost of acquiring a new prospect and/or clients?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.4. Assuming you know your allowable cost of acquiring a new prospect and/or clients, do you invest up to that amount in your marketing efforts to acquire new buyers?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.5. Do you know the average lifetime value of your clients?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.6. How many different marketing activities do you have in place to attract prospects/clients/revenue flow?</p>	<p>0 <input type="checkbox"/> (0 points)</p>	<p>1-2 <input type="checkbox"/> (1 point)</p> <p>3-5 <input type="checkbox"/> (2 points)</p> <p>6-8 <input type="checkbox"/> (3 points)</p> <p>9+ <input type="checkbox"/> (4 points)</p>
<p>1.7. How much do you invest in marketing activities each month?</p>	<p>£0 <input type="checkbox"/> (0 points)</p>	<p><£1k <input type="checkbox"/> (1 point)</p> <p>£1 - 2.5K <input type="checkbox"/> (2 points)</p> <p>£2.5 – 5k <input type="checkbox"/> (3 points)</p> <p>>£5k <input type="checkbox"/> (4 points)</p>
<p>1.8. Do you have a direct response-formatted website?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.9. Do you perform effective (meaning successful at both attracting and converting) search engine optimization that builds more prospects, buyers or business?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.10. Do you have a target prospect list of strategic partners?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>1.11. Do you have any strategic alliances in place right now that are generating you new prospects / clients / revenue flow?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>

2. Referrals

<p>2.1. How many formal referral-generating systems do you currently have with prospects or potential partners?</p>	<p>0 <input type="checkbox"/> (0 points)</p> <p>2-5 <input type="checkbox"/> (2 points)</p>	<p>1 <input type="checkbox"/> (1 point)</p> <p>6+ <input type="checkbox"/> (4 points)</p>
<p>2.2. Are your staff trained in identifying referral generation opportunities?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>2.3. Are your staff compensated for generating referrals?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>2.4. Does at least 25% of your business currently come from referrals?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>2.5. Is the average number of referrals you get every month increasing or decreasing?</p>	<p>Increasing <input type="checkbox"/> (2 points)</p>	<p>Decreasing <input type="checkbox"/> (0 points)</p>
<p>2.6. Do you hold or run special events such as seminars, new product introductions, end of the year pro- motions, private sales, meet the management events, meet the manufacturer events, meet the creator-type events, etc. to encourage referrals?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>

3. Resell Activity

<p>3.1. Have you identified complementary cross-sell offers for all of your products and services?</p>	<p>0 <input type="checkbox"/> (0 points)</p> <p>2-5 <input type="checkbox"/> (2 points)</p>	<p>1 <input type="checkbox"/> (1 point)</p> <p>6+ <input type="checkbox"/> (4 points))</p>
<p>3.2. Is your staff trained in identifying and offering up- sell, cross-sell and down-sell opportunities?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.3. Are your staff compensated for up-sell, cross-sell and down-sell sales success?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.4. Are you up-selling all customers at the initial point of purchase?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.5. Are you communicating offers to your existing customers at least once per month?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.6. How many different media are you using to make your offers (SMS, email, direct mail, etc.)?</p>	<p>0 <input type="checkbox"/> (0 points)</p> <p>2-4 <input type="checkbox"/> (2 points)</p>	<p>1 <input type="checkbox"/> (1 point)</p> <p>5+ <input type="checkbox"/> (4 points))</p>
<p>3.7. Do you have a comprehensive database of your prospects & buyers that identifies everything from names, contact numbers, type of buying, what they buy, source, quantities, past purchases, etc.?</p>	<p>No <input type="checkbox"/> (0 points)</p>	<p>Partially <input type="checkbox"/> (1 point)</p> <p>Yes – Fully <input type="checkbox"/> (3 points)</p>
<p>3.8. Do you have a method to build a continually growing prospect/client list?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.9. Do you actively use all of the data above to target different categories of prospects/buyers in different ways for different products or services?</p>	<p>Yes <input type="checkbox"/> (3 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.10. How many complementary (upsell/cross-sell) products/services do you currently add to your sales proposition?</p>	<p>0 <input type="checkbox"/> (0 points)</p> <p>2-5 <input type="checkbox"/> (2 points)</p>	<p>1 <input type="checkbox"/> (1 point)</p> <p>6+ <input type="checkbox"/> (4 points))</p>

<p>3.11. Do you currently offer bonuses (either tangible or intangible) as an incentive to purchase your product or your service?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.12. Do you ethically (but effectively) prepare buyers from their very first purchasing experience with you to keep coming back to purchase over and over again?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.13. Do you have an active, systematic, ongoing follow-up system for every prospect and first-time buyer you acquire?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>3.14. How often do you follow up with past buyers/clients by phone, mail, email or in-person?</p>	<p>Never <input type="checkbox"/> (0 points) Quarterly <input type="checkbox"/> (2 points)</p>	<p>6 Mthly <input type="checkbox"/> (1 point) Monthly <input type="checkbox"/> (3 points)</p>
<p>3.15. Do you know what your attrition rate is and why a client may stop buying from you?</p>	<p>No <input type="checkbox"/> (0 points)</p>	<p>Partially <input type="checkbox"/> (1 point)</p> <p>Yes – Fully <input type="checkbox"/> (3 points)</p>
<p>3.16. Do you have attrition reduction or client conservation program in place to minimize inactive buyers?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>

4. Reputation Management

4.1.	Do you have a proactive system for creating positive content about your business and disseminating it on the web?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.2.	Do you have a system for monitoring what is being said about your business on the web and social media?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.3.	Do you have a reputation-saving approach to responding to clients that have expressed disappointment in your products/services?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.4.	Do you have a reliable system of collecting and creating client testimonials and success stories?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.5.	Do you effectively and powerfully use your testimonials in all the marketing, advertising & sales efforts you do?	No <input type="checkbox"/> (0 points)	Sometimes <input type="checkbox"/> (1 point)	Always <input type="checkbox"/> (3 points)	
4.6.	Do you have respected people in your field, market or industry who will endorse you and your company without hesitation?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.7.	How many endorsements do you currently have?	0 <input type="checkbox"/> (0 points)	1-3 <input type="checkbox"/> (1 point)	4-9 <input type="checkbox"/> (2 points)	10+ <input type="checkbox"/> (4 points))
4.8.	Do you have a continuous system/approach/ program actively in place to continually secure more prominent endorsements?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.9.	Has your website been effectively optimized for search engine results?	Yes <input type="checkbox"/> (3 points)	No <input type="checkbox"/> (0 points)		
4.10.	Has your website been kept current with news / awards / changes?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.11.	Is your business currently ranking on page 1of search engine results for competitive keyword phrases?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		
4.12.	Do you have complete business listing profiles in the major search engines?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)		

4.13. Do you have an active social media presence?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)
4.14. Do you conduct PR/media relationships/radio/newspaper/magazine interviews/event participation in your industry and local community?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)
4.15. Do you hold or run special events such as educational seminars, new product introductions, end of the year promotions, private sales, meet the management events, meet the manufacturer events, client appreciation events, etc.?	Yes <input type="checkbox"/> (2 points)	No <input type="checkbox"/> (0 points)

5. General

<p>5.1. Do you have someone working on the marketing of your business that has training in marketing?</p>	<p>0 <input type="checkbox"/> (0 points)</p> <p>2-5 <input type="checkbox"/> (2 points)</p>	<p>1 <input type="checkbox"/> (1 point)</p> <p>6+ <input type="checkbox"/> (4 points)</p>
<p>5.2. Do you have someone at your business spending at least 50% of their time dedicated to marketing?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>5.3. Do you have a growth mindset at your business?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>5.4. Do you have a “sales and marketing culture” at your business?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>5.5. Do you have a powerful, unique value proposition that you communicate consistently to your market?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>5.6. Does your marketing make irresistible offers to your prospects or potential buyers?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>5.7. Have you formally surveyed your clients to find out exactly why they buy from you versus the competition?</p>	<p>Yes <input type="checkbox"/> (2 points)</p>	<p>No <input type="checkbox"/> (0 points)</p>
<p>5.8. Do your marketing, sales approaches and advertising activities focus on benefits or features?</p>	<p>Features <input type="checkbox"/> (1 point)</p>	<p>Benefits <input type="checkbox"/> (2 points)</p>
<p>5.9. How do you feel after completing the Audit?</p>	<p>Overwhelmed <input type="checkbox"/> (0 points)</p>	<p>Relieved <input type="checkbox"/> (1 point)</p> <p>Excited <input type="checkbox"/> (2 points)</p>