

SWOT

Session 1

Part 1 – Set Meeting Goals and Expectations

Part 2 - Problems/Challenges in doing business in current market

Marketing

1. Identify current services and current products
2. Identify current market
3. Identify current targets
4. Identify current clients
5. Define the Current Sweet spot(s)
6. Define the current problematic spot(s)
7. Determine your best/worst clients and criteria for determination
8. Do you have an effective marketing strategy that enhances your brand recognition with your target markets?
9. Do you have an effective lead generation process?
10. Are you sure your current marketing efforts are resonating with your intended targets?
11. Do your employees understand the unique value and commitment your company brings to your customers?

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Sales

1. Identify current sales revenues – in total, and by specific client
2. Define the current Business Development /Sales Process – who is contacted, how, timeframe to getting an order, what kind of order
3. Do you have a prospect pipeline? What does it look like? How do you determine the probability of closing an opportunity? Do you know your close ratio? Please provide a copy of the pipeline if you have one.
4. Define pricing and how it is determined for both your services and products
5. Do you have metrics for your salespeople re: outreach calls, contacts, meetings, pipeline reports?

Financial

1. Identify your Company's current resources
2. Please provide your P&L and Balance Sheet for the last two years, and most recent period
3. Is your company regularly reaching your financial goals?
4. Do you have systems for reviewing A/R, A/P, P&L, Balance Sheet quarterly and annual budgets, cash flow management, and tracking of key financial indicators?
5. Define the financial reports you are using to measure your business.
6. Are you getting the financial reports you need?
7. Do you understand and trust the validity of the financial information you receive?
8. Do you know how much your business is worth?
9. Do you have an exit plan?

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Operations/Personnel

1. Do you have a table of organization or organization chart?
2. What does your management team look like?
3. Do you have an up-to-date employee manual?
4. Do you have job descriptions for all employees?
5. Do you have a recruitment process in place?
6. Do you have operational policies and procedures in place?
7. Do you have operational metrics for your key employees?
8. Are you still performing day-to-day activities that could be delegated? Make a list of the top 5 – 10 you are still doing, if any.

Part 3 – Problems/Challenges in developing new services and products

1. Define new services
2. Identify new market
3. Identify new target
4. Identify new business development process
5. Identify new sales process
6. Identify required tools and resources including new marketing materials

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Part 4 – Action Plan

1. Set revenue goals and desired outcomes
2. Define accountabilities
3. Identify tools and resources required
4. Identify dates and milestones
5. Identify consequences for failure
6. Define New Business approach
 - new channels
 - exploit industry experience/contacts
 - exploit customer base – gain referrals
 - determine new marketing materials

Part 5 – Setting Priorities for Parts 3 & 4