

Follow up and extra sales processes?

18. How many times each week do your sales people miss the chance to sell extras, and get extra revenue for them?
 Almost every time 75% 50% 25% Rarely
19. What % value would you guess it is worth to win 10% more of the jobs you estimate each week?: \$

You have the order, now what?

20. What elapsed time does it take to write up the job in days: 1 2 3 4 5 More?
21. What is the average number of orders you create each week: 1 5 8 10 15 More?
22. What is the average minutes taken to write up a job:
23. What elapsed time does it take for the paperwork to reach the factory floor in days: 1 2 3 4 5 More?
24. Who is responsible for the job sheets?: Business Owner Estimator Sales Person Other or Comment:

Do you have re-orders?

25. How many re orders do you get each week?
26. When a customer re-orders, how long does it take to find their prior order?: Seconds Under 1 Minute
 5 Minutes 1 hour 2 hours 3 hours Sometimes days Never?
27. How long does it take to re-price the order and get the new estimate to the customer?: Seconds 1 Minute
 5 Minutes 1 hour 2 hours 3 hours Sometimes days Never?

Production Process Management.

28. How many calls from customers asking to check the status of their job do you receive each week?
29. How long does it take to check on the status of an order or part in production?: Seconds Under 1 Minute
 5 Minutes 1 hour 2 hours 3 hours Sometimes days We can't do this accurately now?
30. How long does it take to make a list of the jobs in production and set the priorities for production for today?: WIP
 Seconds 1 Minute 5 Minutes 1 hour 2 hours 3 hours Sometimes days Never?
31. How do you create a list of individual staff priorities?:

General Process Control observations.

32. How much time is spent re-writing information each week? Sales requests, creating the estimate, the job order, etc.
Please explain:
33. How many times each week do the production personnel have to contact a customer to obtain more information due to lack of information or the original info on the work order is incomplete?
 Once Twice About 5 Many times Too Many to count

What does the future hold for your business?.

34. Goal Setting is a powerful tool, what are your goals for:
12 Months;
- 24 Months;
- 36 Months;
- Comments:
35. What are the top 3 issues in your business:
Issue No. 1;
- Issue No. 2;
- Issue No. 3;
- Comments:

36. Describe you see the following points of your business?

Strengths:

Weakness:

Opportunities:

Threats:

37. Describe your biggest disaster?

38. Describe your greatest achievement?

39. Any other comments?

40. How can we help?

