

Maximum Value Partners, LLC

Business Effectiveness Evaluation - Page 1 of 3



Name: _____ Title: _____ Telephone: _____

Company: _____ Number of Employees (current) _____ (prior year) _____

The following questionnaire has been designed to help you rate your business in various key areas. Read each statement and rate where your business stands today by filling in your level of agreement with the statement from 1 to 10 in the scoring column. Once complete, return this form along with a copy of your two most recent and correct financial statements to **Maximum Value Partners, LLC** by Fax at **866-715-4414** or mail at **P.O. Box 31151, Independence, OH 44131**, so we can set up a time to review the results with you.

MARKETING	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
I understand the difference between Marketing and Sales.	1		10
I can clearly present our target market(s) including key demographics and details regarding what they're buying.	1		10
We have at least 10 marketing strategies active at all times	1		10
Our marketing message addresses our target market and their interests DIRECTLY.	1		10
All of our marketing tells the prospect exactly what to do next in making contact with us.	1		10
We track all leads, and know exactly what marketing channel brought the prospect into contact with us.	1		10
Our marketing message is dramatically different from our competitors'.	1		10
We are constantly looking for new ways to provide additional products and services to our target market.	1		10
Our marketing message is consistent across all channels that we use. We use strategies such as guarantees and testimonials to enhance our marketing message in all communications.	1		10
We maintain a current database of current and potential customers. We communicate with past customers on a regular basis to ensure that they come back again and again.	1		10

SALES	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
We have a clear process for setting the selling price for our products and services.	1		10
We use scripts in all of our initial contacts with potential customers (Phone/Face-to-Face/Walk-in/Internet, etc.)	1		10
We measure all of the variables of our sales process, including such things as average number of appointments before the sale, the conversion rate (prospect to client), sales cycle, etc.	1		10
We have a proven, defined, and written sales system.	1		10
We provide our sales team with effective tools to help them convert prospects more effectively (demonstrations, samples, etc.)	1		10
Our sales staff has regular, formal training on both product knowledge and sales skills. We motivate our sales team effectively using time-tested motivational techniques.	1		10
We use the most current technology to track the sales team's activity, such as appointments, prospect lists, etc.	1		10
We follow up with prospects who didn't buy from us to find out why.	1		10
We have regular sales meetings.	1		10
Our sales team has a terrific relationship with all of the other departments.	1		10

CUSTOMER SERVICE	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
The outside appearance of the business is current, orderly, and professional - including the buildings, lots, and signage.	1		10
The inside of the business is professional, neat, clean and comforting to the customer.	1		10
Our employees are well-dressed, groomed properly, and maintain a neat, consistent appearance.	1		10
We consistently deliver on time, and in an instance where we are not on time, we notify the customer immediately.	1		10
We consistently "under-promise and over-deliver."	1		10
We quickly resolve customer dissatisfaction to the satisfaction of the customer.	1		10
We do the "little things" to make our customer's experience unique, and we are always looking for new ways to enhance their experience with us.	1		10
We survey customers regularly to see how we are performing.	1		10
Our customer service is always consistent.	1		10
We constantly follow-up on customer dissatisfaction issues to ensure better products and services in the future.	1		10

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ORGANIZATION	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
We maintain an updated organizational chart according to functions performed.	1		10
We have an effective and formalized hiring system (we are "slow to hire and quick to fire").	1		10
Our new hires are effectively trained in a systemized process.	1		10
All new employees read and understand the rules and procedures (usually found in an employee manual), our Mission, and our Vision.	1		10
Our employees are highly motivated.	1		10
We provide timely feedback to employees on their performance as well as formal evaluations on a regular basis.	1		10
We have regular staff meetings, and we stick to a prepared agenda.	1		10
Our company-wide communication is excellent.	1		10
We have written job descriptions for every position.	1		10
We provide an atmosphere where our employees love coming to work.	1		10

YOUR BUSINESS SYSTEM	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
If I was absent from the business for six months, the business would continue to grow.	1		10
We regularly review our facilities and equipment (e.g. phone, computers) to make sure everything is up to date.	1		10
All business systems have been flowcharted.	1		10
We have a complete company Operations Manual where procedures are documented, and it is being constantly improved and updated.	1		10
All of the software we use is compatible, and no duplication of tasks is necessary.	1		10
We have identified all tasks in the business that could be handled routinely by systems.	1		10
All routines are followed, and we hold exceptions accountable.	1		10
Our system is as simple as possible.	1		10
I am able to work whenever I want, and do not worry about the business when I am not there.	1		10
I spend most of time improving my business system - not doing everyday tasks or putting out fires.	1		10

PROFIT MARGINS	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
We measure gross profit by job/product line, etc.	1		10
All expense components of the cost of sales are at their lowest point possible.	1		10
We serve only those customers that we are able to make a maximum profit on.	1		10
We never discount.	1		10
We prepare annual profit plans (i.e. budgets/forecasts) with written assumptions for how we are going to make money this year and we track progress against that plan at least monthly.	1		10
Employees are compensated for producing higher profit margins.	1		10
All fixed costs of operating the business are at a minimum.	1		10
We track equipment costs to ensure that equipment is used in the most efficient way possible.	1		10
We track our finance costs to ensure the lowest possible financial arrangements.	1		10
We use the best tax accountants to ensure the lowest possible tax bill.	1		10

FINANCIAL MANAGEMENT	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
Financial statements are current.	1		10
I understand my financial statements.	1		10
We review our financial statements at least on a monthly basis.	1		10
We use Key Performance Indicators to measure the effectiveness of marketing, sales, customer service, and other areas of the business.	1		10
Our cash flow is good and easily meets the demands of the business. We use a system to project cash flow for the next 90 days that is reviewed at least weekly, if not daily.	1		10
Our accounting procedures are well documented in the Operations Manual.	1		10
We meet with our accountant at least quarterly.	1		10
We maintain good banking relationships and receive great value for the lowest cost possible.	1		10
We review company liquidity, leverage, efficiency and profitability ratios on a regular basis.	1		10
We use the best accounting software for our industry.	1		10

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LEADERSHIP	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
I am able to present my company well within the framework of MVP's 3 circles (Product/Service, Marketing & Sales, and Administration).	1		10
We have a company Mission, Vision and Culture that the employees are excited about.	1		10
I spend most of my time working ON the business (planning, etc.) rather than IN the business (everyday tasks).	1		10
I have a clear idea of how I would like to exit the business and am working to execute that plan.	1		10
I make the employees feel that they are a part of the team, I collect their input regularly, and I praise my employees immediately when they do a good job.	1		10
We negotiate the best possible outcomes for the business under all circumstances (e.g. vendors, employees, investors, customers).	1		10
I hold my employees accountable for their job functions.	1		10
I am honest at all times with my employees. I am an excellent communicator with my staff.	1		10
I understand human behavioral modalities, and I adapt my behavior to the person I am speaking with at the time. I am familiar with motivational models, and I employ motivational strategies that are effective.	1		10
I am comfortable with how the business is incorporated and why.	1		10

PERSONAL AND WORK/LIFE BALANCE	<- Disagree Completely	Your Score (Fill In)	Agree --> Completely
I know what I want out of my life and I move towards it every day.	1		10
I set goals and review them daily.	1		10
I hardly ever have negative self-talk.	1		10
I exercise regularly.	1		10
I have a hobby that I enjoy, and I am active in it.	1		10
I spend plenty of quality time with my family.	1		10
I have friends that I enjoy socializing with, and I do it often.	1		10
My personal finances, retirement plans, insurance, and death planning are excellent.	1		10
I never have trouble sleeping.	1		10
I am proud of myself.	1		10

Thank you for taking the time to fill out your Business Effectiveness Evaluation!

The final step is to fax or mail us this Questionnaire along with your two most recent and accurate financial statements. We will get back to you within one week to set up a time to go over your report.