



In Helping You Consider
Your Needs..

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Step 1 - Complete our Work Flow and Information Management Health Check

1. Work through only those business areas that are relevant to you.
2. Read each sentence in a given business area. Circle the rating that best reflects your current situation.
3. Fill in the Current Status Chart at the end of the Health Check.

[1] Client / Customer Management		Not So Well			Very Well	
1	We maintain very good client / customer details.	1	2	3	4	5
2	We can find a given client's details quickly.	1	2	3	4	5
3	We can quickly identify who in our business last spoke with a given client.	1	2	3	4	5
4	We can quickly view a list of a given client's previous orders.	1	2	3	4	5
5	We maintain regular contact with existing clients.	1	2	3	4	5
Totals:		_	_	_	_	_
Grand Total:						

[2] Leads and Quotes Management		Not So Well			Very Well	
1	We follow up on leads quickly and effectively.	1	2	3	4	5
2	We track the progress of a lead effectively.	1	2	3	4	5
3	We can quickly locate a quote when a lead contacts us again.	1	2	3	4	5
4	We can quickly produce a list of unconverted leads for review.	1	2	3	4	5
5	We can track or monitor our salespeople's success.	1	2	3	4	5
Totals:		_	_	_	_	_
Grand Total:						

[3] Marketing Management

		Not So Well			Very Well	
1	We can quickly identify numbers of leads and conversations in a given time.	1	2	3	4	5
2	We can quickly review our most effective marketing campaigns.	1	2	3	4	5
3	We can identify if our advertisements are giving us good return.	1	2	3	4	5
4	We can identify the suburbs or regions where our products / services are most successful.	1	2	3	4	5
5	We can track and report on feedback from our leads and clients.	1	2	3	4	5
Totals:		___	___	___	___	___
Grand Total:						

[4] Orders/Jobs Management

		Not So Well			Very Well	
1	We can quickly generate an order or job from a quote.	1	2	3	4	5
2	We can quickly and effectively track or monitor the progress of an order or job.	1	2	3	4	5
3	We can effectively track and manage staff / sub-contractors' hours by order or job.	1	2	3	4	5
4	We can quickly prepare e-mail invoices for our clients.	1	2	3	4	5
5	We can generate appropriate accounting reports or transfer data electronically to an accounting package.	1	2	3	4	5
Totals:		___	___	___	___	___
Grand Total:						

[5] Stock Management		Not So Well			Very Well	
1	We can identify quickly if a given stock item is available for an order.	1	2	3	4	5
2	We can quickly generate stock lists by category.	1	2	3	4	5
3	We can quickly update our prices based on supplier increases.	1	2	3	4	5
4	We can effectively identify stock movements and product success.	1	2	3	4	5
5	We can effectively manage and track our orders to suppliers.	1	2	3	4	5
Totals:		_	_	_	_	_
Grand Total:						

[6] Project / Job Management		Not So Well			Very Well	
1	We record project / job establishment details - tasks and activities, anticipated timelines and costs.	1	2	3	4	5
2	We effectively track project / job status.	1	2	3	4	5
3	We effectively record and can quickly recall project/jobs events, change and comments.	1	2	3	4	5
4	We can present project / job timelines and status graphically.	1	2	3	4	5
5	We effectively track and monitor project / job costs as projects proceed.	1	2	3	4	5
Totals:		_	_	_	_	_
Grand Total:						

[7] Asset Management		Not So Well			Very Well	
1	We can quickly generate an asset list by location and/or type.	1	2	3	4	5
2	We can quickly review the maintenance history of each asset.	1	2	3	4	5
3	We maintain a maintenance schedule.	1	2	3	4	5
4	We maintain a location and/or loan log for each asset.	1	2	3	4	5
5	We effectively manage asset purchase, sale and depreciation write-off.	1	2	3	4	5
Totals:		___	___	___	___	___
Grand Total:						

[8] Employees, Subcontractors, Timesheets and Payroll		Not So Well			Very Well	
1	We can quickly locate important staff and /or subcontractor details, e.g: contract(s), medical and pay details.	1	2	3	4	5
2	We effectively manage staff timesheets, automating their link to current projects and jobs.	1	2	3	4	5
3	We effectively manage staff payroll and/or subcontractor payments.	1	2	3	4	5
4	We effectively track employee entries in our business system - new entries and changes.	1	2	3	4	5
5	We provide restricted access to our business system - so staff can enter business data relevant to their role.	1	2	3	4	5
Totals:		___	___	___	___	___
Grand Total:						

[9] Reminders and To-do Management

Not So
Well

Very
Well

We have an effective integrated reminder system for:						
1	Client callbacks.	1	2	3	4	5
2	Client periodic reminder letters, birthday cards, etc...	1	2	3	4	5
3	Staff reviews.	1	2	3	4	5
4	Meetings, events and engagements.	1	2	3	4	5
5	Asset Maintenance.	1	2	3	4	5
Totals:		—	—	—	—	—
Grand Total:						

[10] Management Reports

Not So
Well

Very
Well

We can quickly generate management reports that assist you to manage:						
1	Staff hours, staff effectiveness.	1	2	3	4	5
2	Marketing effectiveness and performances.	1	2	3	4	5
3	Business cash flow and financial health.	1	2	3	4	5
4	Product success and stock turnover.	1	2	3	4	5
5	Assets and capital purchases.	1	2	3	4	5
Totals:		—	—	—	—	—
Grand Total:						

Current Status Chart

25										
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1										
	Clients	Leads & Quotes	Market- ing	Orders / Jobs	Stock	Projects / Jobs	Assets	Empl / SubC	Remndr / To-do	Mngmnt Reports

Current Status Results:

In looking at each business area above, the ratings might be indicating to you:

- 0-5** This business area is either not important for your business, or it needs immediate attention.
- 6-10** This business area is either not significantly important, or is in significant need of attention.
- 11-15** This business area has reasonable room for improvement.
- 16-20** This business area may need some attention.
- 21-25** This business area is looking good, minor tweaking may be helpful.