

Revenue Engine Performance Check-Up Report

Reading Your Report:		Company Name: Matthew Appliance		
Indicates low risk and good management control in this area.		Address: 5315 Main St. Anywhere, USA		
Indicates medium risk, attention is needed in this area.		Phone Number: 813-221-4741		
Indicates high risk, immediate attention is needed in this area.		E-Mail:		
		Web Site:		
Overall Revenue Engine Performance Index		12		
Performance Questions		Yes/No	If Yes,	Validation Answer
General:				
1	Do you have a set revenue goal for the current year?	Yes	What is your goal?	2.8 million
2	Do you have a written plan for how you will achieve it?	NO		Accountability is lacking without a plan from which to measure progress.
3	Do you know how much capital is required to reach your goal?	Yes	How much?	
4	Do you have the required capital or identified a sources?	Yes	Who is your source?	Bank
5	Do you know when you will require this capital?	NO	Enter date needed.	Not knowing when you need capital presents high risk as you cannot set appropriate financial objectives which will later slow or even stop future growth.
General Performance Index Score =		3		
Operations:				
6	Do you know the maximum capacity of your operation?	No	How much?	Not knowing your maximum capacity means you do not fully understand the capability of your operation or how much revenue your business can currently generate.
7	Do you know how long it takes to deliver one unit of product/service (cycle time)?	yes	How long? (in hours)	2.75 hours
8	Do you know the direct cost of all materials and labor to deliver one unit of product/service?	yes	How much?	~\$75
9	Do you know the constraining resource of your operation?	Yes	What is it?	People/ equipment
10	Do you know the cost to add 1 more of this resource?	Yes	How much?	\$50K for tech
11	Do you know when you will need to add more of the constraining resource to reach your revenue goal?	NO	When?	Understanding when to add resources to your current operation reduces both your operational and financial risk.
Operations Performance Index Score =		4		

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Overall Revenue Engine Performance Index		12			
Performance Questions		Yes/No	If Yes,	Validation Answer	Risk
Sales:					
12	Do you know your revenue year to date?	Yes	How much?	\$2.3 million	
13	Do you know how many transactions were closed for this revenue?				Not knowing how many transactions you've sold significantly increases sales risk not allowing proper sales performance monitoring to occur.
		NO	How many?		
14	Do you know the average price of these closed transactions?				Monitor "average price" as an accountability target for how much "discount" is provided by the sales team.
		NO	How much?	Info available in J	This Key Performance Indicator (KPI) is required to measure sales team performance.
15	Do you know how many quotes/proposals were written to create the closed transactions?				
		NO	How many?		
16	Do you know how long it takes to make a sale (sales cycle)?	Yes	How long?	3/4 of an hour	
17	Do you know how many hours a sales person spends on a sale?	Yes	How long?	3/4 of an hour	
18	Do you know the cost to add more sales resource?				Labor is the #1 cost for most businesses. Not knowing this number significantly increases your financial risk.
		No	How much?		
19	Do you know when sales people need to be added to reach your goal?				Improve your management risk by understanding when more labor is needed in your sales department.
		NO	When?		
Sales Performance Index Score =		3			
Marketing:					
20	Do you know how many leads marketing generated year to date?				Lead volume is a key indicator of marketing performance and leading indicator of market and economic shifts.
		NO	How many?		You cannot measure marketing effectiveness without this variable.
21	Do you know how many of the leads received became quotes/proposals?				
		No	How many?	All of them	
22	Do you know how many marketing campaigns year to date?				
		Yes	How many?	5	
23	Do you have an individual (manager or agency) responsible for managing your company marketing efforts?				Marketing is the least understood function in most small businesses. Resourcing marketing properly has huge impact on your revenue performance.
		Yes	Manager or agency?	Chris	
24	Do you have a marketing budget?	Yes	What % of revenue?	3%	
25	Do you know the cost to add more marketing resource?				Labor is the #1 cost for most businesses. Not knowing this number significantly increases your financial risk.
		NO	How much?		
26	Do you know when to add more marketing to reach your revenue goal?				Improve your management risk by understanding when more labor is needed in the marketing function.
		NO	When?		
Marketing Performance Index Score =		2			