

CHECKLIST

BUSINESS SCALABILITY

OPTIMIZATION & AUTOMATION

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| --- | --- |
| **COMPANY INFORMATION** | |
| Company name: |  |
| Filled in by: | (name, title) |
| Date | XX/XX/XXXX |

Function: **SALES**

| S.No. | Questions | Yes | No |
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| **Sales Process** | | | |
| Q.1 | Does your business generate desired revenue (answer “yes” only if you wouldn’t want to see your company generated more sales last year)? |  |  |
| Q.2 | Do you find that growing company 5 time this year would be easy with your current strategies, tactical plan and resources? |  |  |
| Q.3 | Do you have a defined and documented sales process (i.e., how Prospecting, Pre-sales, Pitch, Proposal, Negotiation, Handling Objections, Closing, and Follow-ups look like) so that your sales team works in a structured manner? |  |  |
| Q.4 | Do you have an automated method of generating “closing” documents such as an MOI or/and contract? |  |  |
| Q.5 | Does your revenue from existing accounts/customers increase from last year by at least 20%? |  |  |
| Q.6 | Do you have an efficient system for researching your sales leads before reaching out with a pitch or proposal? |  |  |
| S.No. | Questions | Yes | No |
| Q.7 | Are you using standardized and automated templates easily customized for each customer across the entire package of documents each customer received during your complete pre-sales and post-sales cycles? |  |  |
| Q.8 | Does your template management system automatically populate your messages with CRM data, so you don't have to type your prospect's name and company name over and over again? |  |  |
| Q.9 | Do you have an automatic system that reminds you when to follow up with a prospect who hasn't returned your email or voicemail? |  |  |
| Q.10 | Do you have an optimal plan for who your sales reps will call or/and email each day, or are they calling random contacts at random times? |  |  |
| Q.11 | Does your system keep accurate records of prospects and customer correspondence? |  |  |
| Q.12 | Do you have a system in place that would spare you from wasting time searching through your inbox and calendar to figure out when you last communicated with a prospect and what the correspondence was? |  |  |
| Q.13 | Do you have a system that allows you to record and analyze your sales reps calls' effectiveness? |  |  |
| Q.14 | Do you have an automatic system of tracking which deals are in which stage of your sales process? |  |  |
| Q.15 | Do you use predictive analysis for the preparation of sales forecasts? |  |  |
| **Sales Funnel Optimization** | | | |
| Q.16 | Have you identified all activities/ steps needed to turn an inquiry into a potential customer? |  |  |
| Q.17 | Does your sales collateral address your target customer's pain points, and the content is dripped to prospects in a well-thought manner? |  |  |
| Q.18 | Does your marketing funnel have a lead magnet that would get prospects to enter your sales pipeline? |  |  |
| Q.19 | Do your sales funnels use well tested, optimized, personalized, and automated landing pages with opt-in forms that offer optimal segmentation? |  |  |
| Q.20 | Does the content of your sales funnel effectively nurture relationships with your prospects on every stage? |  |  |
| Q.21 | Do you use automated video content delivery and have an easy way to distribute videos to provide solution-oriented content to the prospects? |  |  |
| S.No. | Questions | Yes | No |
| Q.22 | Do you use frequently updated social proof, i.e., prospects evidence of your company’s success or popularity through testimonials, customer reviews, success stories, and customer count across all your digital assets? |  |  |
| **Sales Performance Optimization** | |  |  |
| Q.23 | Do you have an effective and efficient Sales Pipeline Management System that allows your sales reps to focus on the best leads, eliminate dead leads, monitor pipeline metrics, update your pipeline regularly and keep your sales cycle short? |  |  |
| Q.24 | Do you have Activity Sales Metrics - quantified numbers of interactions, conversations, or emails that that, in combination with performance and productivity metrics, highlight inefficiencies and help management identify individuals who might need additional training? |  |  |
| Q.25 | Do you have Pipeline Sales Metrics that are reassessed regularly to maintain your sales pipeline's health and focus attention where it's most needed? (figures that point to how long is your sales cycle, how often are your leads converting, etc.) |  |  |
| Q.26 | Do you anticipate potential areas of growth or weakness using data, i.e., having a predictive model to prioritize long-term growth over reactionary course corrections? |  |  |
| **Sales Operations** | | | |
| Q.27 | Do you have at least one professional sales rep dedicated to interactions with potential customers? |  |  |
| Q.28 | Do you have a sales leader on staff that excels at coaching and training your sales staff? |  |  |
| Q.29 | Have you used an executive coach or/and sales coach to help your sales reps to identify their mental or process-specific obstacles to meeting and exceeding their sales quota? |  |  |
| Q.30 | Do you conduct regular coaching meetings with your front-line sales team members? |  |  |
| Q.31 | Have you ever used an outsourced SDR (sales development reps) service company to scale your sales operation? |  |  |

Function: MARKETING

| S.No. | Questions | Yes | No |
| --- | --- | --- | --- |
| **Marketing Operations** | | | |
| Q.32 | Do you have the capability to segment/define/refine/mix lists of potential customers for different campaigns? |  |  |
| Q.33 | Do you have a way to run effective affiliate marketing programs and track your referrers, sales partners, or resellers' performance in a synchronized system? |  |  |
| Q.34 | Do you have clear processes and an automated system that would allow you to auto-generate pre-sales proposals for your prospects? |  |  |
| Q.35 | Do you have an effective prospects segmentation in place that would allow you to instantly score leads when prospects book consultation with your team, request a case study or white paper download, or sign up for the trial? |  |  |
| Q.36 | Do you have an SMS, ringless voicemail, or any other automated leads nurturing channels other than a single email channel? |  |  |
| Q.37 | Have you developed and tested at least 3 lead magnets and at least 5 sales funnels to optimize step by step customer conversion path and packaged offers? |  |  |
| Q.38 | Do your marketing budget and resources match your business goals, i.e., ensuring that you’re allocating the right amount of your account to marketing, so your other business investments are not affected? |  |  |
| Q. 39 | Does your marketing system track costs of marketing against revenue to indicate cost overrun? |  |  |
| Q. 40 | Does your marketing system track all needed types of campaign responses from a potential customer? (e.g., in the case of an email campaign, how many times a customer opens, clicks, links clicked, bounces, downloads, opt-ins, etc.). |  |  |
| Q.41 | Do you track lead sources in your system and regularly assess channel efficiency? |  |  |
| Q.42 | Do you measure campaign performance using KPIs (such as ROI, CPC, CPA, CPS)? |  |  |
| Q.43 | Are you fully satisfied with the performance of your current lead generation efforts – sales lead volume, quality, and cost per acquisition? |  |  |
| Q.44 | Do you have a nurture campaign-newsletter program or regular e-letter broadcasts with content that uses repurposed content (published papers, produced for ads videos, educational webinars, etc.)? |  |  |
| Q.45 | Do you have email sequences set-up with tracking and reporting on opens and clicks that would automatically trigger targeted email responses based on the recipient’s actions or behavior? (such as click on a specific link within emails, downloading a particular paper, and viewing a minimum defined percentage of video content, etc.) |  |  |
| Q.46 | Does your system trigger alerts based on lead activities (interaction with your web or email content) and inform sales reps about leads prioritized by who is most likely to buy? |  |  |
| Q. 47 | Do you have the capability and competence to build landing pages without the help from IT and direct traffic to customized, personalized landing pages based on segmentation? |  |  |
| Q. 48 | Have you optimized the placement of your lead forms on landing pages of your website to progressively collect information from visitors with each subsequent site visit, adding offer-specific segmentation? |  |  |
| Q. 49 | Do you conduct A/B Testing, i.e., experimenting with subject lines, copy, graphics, calls-to-action, frequency, etc., to see which emails perform best and test content on landing pages, social ads, display ads, and more based on segmentation? |  |  |
| Q.50 | Do you have SEO research and reporting system set-up that would automatically generate lists of new keywords, develop recommendations on web and landing page optimizations, identify inbound link opportunities, etc.? |  |  |
| Q.51 | Do you have a marketing software that you are happy with and performs according to your preferences and needs to optimize your business most efficiently to tap into your target market and execute effective campaigns cost-effectively? |  |  |
| Q.52 | Can you view all of your events and campaigns in a color-coded, centralized team calendar and easily compare them to goals? |  |  |
| Q.53 | Can you perform lead/customer lifecycle management, i.e., efficiently and effectively engage, track, nurture, and manage all leads at each stage of the funnel? |  |  |
| Q.54 | Have you done segmentation of database by demographics, firm-o-graphics, simple behaviors (e.g., click on a link in an email), and cross-channel actions (e.g., shared content on Facebook)? |  |  |
| Q.55 | Do you monitor how leads engage with your content and whether you can add new content to campaigns according to lead activities, automatically suppressing content your prospect has already seen? |  |  |
| Q.56 | Can you easily track cross-channel behaviors to send personalized nurture emails and coordinate marketing initiatives across channels? |  |  |
| Q.57 | Can your marketing tools allow you to have real-time personalization, i.e., personalize emails, landing pages, website content for different site visitors based on their behaviors and attributes, and auto-populate messages with program-specific information? (such as names, dates, offer name, company names, etc.) |  |  |
| Q.58 | Do you have advertising integrations, i.e., personalized digital ads into email outreach and nurture streams? |  |  |
| Q.59 | Do you have CRM/database integration that enables marketing automation and CRM system to sync in real-time so that data is always up-to-date, allowing the sales team to act quickly and accurately? |  |  |
| Q.60 | Does your marketing team have specific outreach targets such as tracking conversions to cold leads, warm leads, and sales? |  |  |
| Q.61 | Do you use social media marketing tools to communicate, research, and monitor your prospects and customer requirements and tailor your campaign accordingly? |  |  |
| Q.62 | Does your marketing team create surveys or capture information gathered by the sales team and customer support that may be relevant to enhancing or redirecting your marketing strategies in the future? |  |  |
| **Marketing Analytics** | | | |
| Q.63 | Do you perform marketing analytics to identify customer behavior, trends, and performance for different marketing campaigns? |  |  |
| Q.64 | Does your team have enough in-house competencies to use analytics tools such as Google Analytics or Kissmetrics to determine the effectiveness of a product/offer, designed buyer journey, the efficiency of conversion elements, etc.? |  |  |
| Q.65 | Do you analyze customer’s demographics and operational data in order to generate “customer insight”? |  |  |
| **Digital Marketing** | | | |
| Q.66 | Do you have developed and approved a digital marketing strategy focusing on a specific audience and identifying its needs, interests, and pain points? |  |  |
| Q.67 | Is your website's design aligned with digital marketing goals (5S, i.e., Sell – Grow sales, Speak – Get closer to a customer, Serve – add value, Save – save cost, Sizzle – extend your brand online)? |  |  |
| Q.68 | Is your website optimized for the highest possible traffic conversion to lead and lead to a closed sale? |  |  |
| **Marketing Cost Optimization** | | | |
| Q.69 | Have you standardized all used sales and marketing platforms and tools? |  |  |
| Q.70 | Have you renegotiated technology licensing agreements or substituted your tool with more cost-effective alternatives? |  |  |

Function: OPERATIONS

| S.No. | Questions | Yes | No |
| --- | --- | --- | --- |
| **Operations** | | | |
| Q.71 | Do you have processes in place to match your ability to deliver (product or service) to match the demand generated by your sales and marketing staff? |  |  |
| Q.72 | Do you have needed automation to power operational efficiency improvement to meet an unexpectedly high demand on your product or service (for example, if DIGITOMIZATION outsourced SDR team will bring you a few additional millions of dollars in bookings)? |  |  |
| Q.73 | Does your system have defined KPIs (such as customer satisfaction score, retention, amount ($) of up-sell opportunities, service renewal rate, number of customer complaints, etc.) supplier evaluation? |  |  |
| Q.74 | Do you have easy e-invoicing and online payment system that would allow the sales team to accept money on the call and “close” prospects with “urgency specials”? |  |  |
| Q.75 | Do you keep customer information such as past services rendered and post-sales interaction history in your system? |  |  |
| Q.76 | Do you have complaint management and monitored reputation management processes in place? |  |  |
| Q.77 | Is customer information and activity history easily accessible to customer support representatives? |  |  |
| Q.78 | Do you perform regular system data checks and marketing campaigns synchronization with CRM and other tools to avoid prospects and customer record duplications and obsolete customer records information? |  |  |

Function: HUMAN RESOURCE

| S.No | Questions | Yes | No |
| --- | --- | --- | --- |
| **Recruitment Operations** | | | |
| Q.79 | Do you have a system based KPIs for Human Resource function (such as actual versus the budgeted cost of hire, annualized voluntary employee turnover rate, annualized voluntary turnover rate, average interviewing costs, the average length of placement, etc.)? |  |  |
| Q.80 | Do you have the right skills and competent staff in your company, so all functions are performed at their optimal? |  |  |
| Q.81 | Is your hiring process optimized and proactive, so you don't have critical positions vacant that hamper the departments' operations, resulting in delays in decision making or execution? |  |  |
| Q.82 | Do you have an effective applicant tracking system to understand your hiring pipeline? |  |  |
| Q.83 | Do you have hiring pipeline metrics in your recruitment system? |  |  |
| Q.84 | Have you assessed your hiring velocity, i.e., how quickly a candidate moves from stage A to stage B to fill the jobs with correct candidates promptly? |  |  |
| **Sourcing and Attracting Talent** | | | |
| Q.85 | Do you have a sourcing strategy and tools that allow you to find talent through various online sources proactively? |  |  |
| Q.86 | Do you have an automated screening system to exclude unqualified applicants from the process on time? |  |  |
| Q.87 | Do you have any sourcing bot or other tools which automatically seek out candidates online and match them with open job requirements? |  |  |
| **Converting Applicants** | | | |
| Q.88 | Do you have a system that allows you to identify which step in the candidate’s conversion to a new hire is the bottleneck? |  |  |
| Q.89 | Do you have an automated email communication set-up to keep candidates informed about where they stand instead of sending correspondence manually? |  |  |
| Q.90 | Do you have an automated pre-screening with a recruiting chatbot or other tools to disqualify all candidates who don’t have the must-haves? |  |  |
| Q.91 | Do you have an interview scheduling tool for efficient and convenient scheduling? |  |  |
| Q.92 | Do you have a system that allows you to keep backup candidates warm and ready to get back into the pipeline if your selected candidate fails to join? |  |  |
| Q.93 | Do you have an effective automated system to score the resume you receive to reduce the time consumed in screening resumes manually? |  |  |
| Q.94 | Do you have an automated onboarding process, i.e., welcome emails or texts, technology passwords, and training invites sent at the push of a button? |  |  |

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| **On- Boarding Operations** | | | |
| Q.95 | Do you have specific and digitized training for new hires? |  |  |
| Q.96 | Do you have portals for customizing workflows to match an organization’s orientation needs and send automated reminders to ensure that all onboarding tasks are completed on time? |  |  |
| Q.97 | Do you schedule regular catch-ups and mentoring sessions over the first few months so that you can closely monitor how new hires are settled? |  |  |
| Q.98 | Do you set clear goals and performance objectives for your new hire’s first 3 months and 6 months to evaluate performance? |  |  |
| Q.99 | Do you have a system that gathers new hires feedback as a result of introductory meetings with each department throughout the company, so that they not only get a full understanding of different aspects of your business but also possibly make improvement suggestions based on observation of alternative ways of doing things at their previous places of employment? |  |  |
| **Staff Training** | | | |
| Q.100 | Do you take sufficient steps to reduce your employee turnover by providing them with non-financial incentives such as professional and personal development opportunities? |  |  |
| Q.101 | Do you have Hiring and Training Metrics measured within your system (such as Cost Per Hire, Time to Hire, Turnover/Retention, Employee Training Completion Rates, Employee Performance, Offer Acceptance Ratio, Applicant-to-Hire Ratio, Absenteeism, etc.)? |  |  |
| Q.102 | Do you provide online forms of training to your employees? |  |  |
| Q.103 | Have you taken the necessary steps to digitize and transfer knowledge and professional know-how of your best performing team members? |  |  |
| Q.104 | Do you have any Learning Management system (LMS)? |  |  |
| S.No. | Questions | Yes | No |
| Q.105 | Have you developed training materials accessible on mobiles phones as well for easy access for employees? |  |  |
| Q.106 | Do you leverage third-party trainers who are experts in various aspects of the business that will be valuable for your staff? |  |  |
| Q.107 | Do you create Internal Trainers and Experts, i.e., using your knowledgeable and experienced staff to train other employees? |  |  |
| Q.108 | Do you measure your training investment and ROI? |  |  |
| Q.109 | Have you allocated a sufficient staff coaching and training budget for this and next year to bring expert trainers who can help you build your A-team? |  |  |

Function: **INFORMATION TECHNOLOGY**

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| S. No | Questions | Yes | No |
| **Technology Governance** | | | |
| Q.110 | Are your policies, standard operating procedures available on the intranet for every employee to make it easy for them to refer and run operations effectively? |  |  |
| Q.111 | Do you have a data governance policy for each department to ensure data is usable, accessible, and protected? |  |  |
| Q.112 | Do you have a sufficient mechanism (metrics like the ratio of data to errors, number of empty values, data transformation error rates, email bounce rates, data storage costs, data time-to-value) to measure your data quality (such as customers, sales forecast &, etc.)? |  |  |
| Q.113 | Do you plan a training schedule for your staff to train for any new software you buy or build? |  |  |

If you answered “No” to at least three questions, please [book your FREE strategy session here](https://digitomization.com/book-intro-strategy-session/) and learn how we can help.

Please see our case studies:

*“*[***From zero to $3mln revenue within 12 months.*** *Unprecedented ROI delivered by a knowledge monetization program!*](https://digitomization.com)*”*

*“*[***An easy $30 mln challenge.*** *Deployment of strategies for fundraising for a digital spin-off and for scaling a parent company*](https://digitomization.com)*”.*