



The Full Circle Business Assessment

Planning for “Organic Growth with a Strategic Mindset”

Master Class Workbook

Advertising & Marketing

Initial Call

Estimate/Sale

Scheduling

Production

Billing & Collections

Customer Satisfaction

Follow Up & Referrals

*The Full Circle
Customer Experience*



The Full Circle Customer Experience - Gap Analysis

Advertising & Marketing

1 2 3 4 5 6 7 8 9 10

Initial Call

1 2 3 4 5 6 7 8 9 10

Estimate & Sale

1 2 3 4 5 6 7 8 9 10

Scheduling

1 2 3 4 5 6 7 8 9 10

Production

1 2 3 4 5 6 7 8 9 10

Billing & Collections

1 2 3 4 5 6 7 8 9 10

Customer Satisfaction

1 2 3 4 5 6 7 8 9 10

Follow Up & Referrals

1 2 3 4 5 6 7 8 9 10

Overall Score

/ 80

Goal

/ 80

What needs immediate attention?

What's a possible short term solution(s)?

What's the long term and permanent solution?

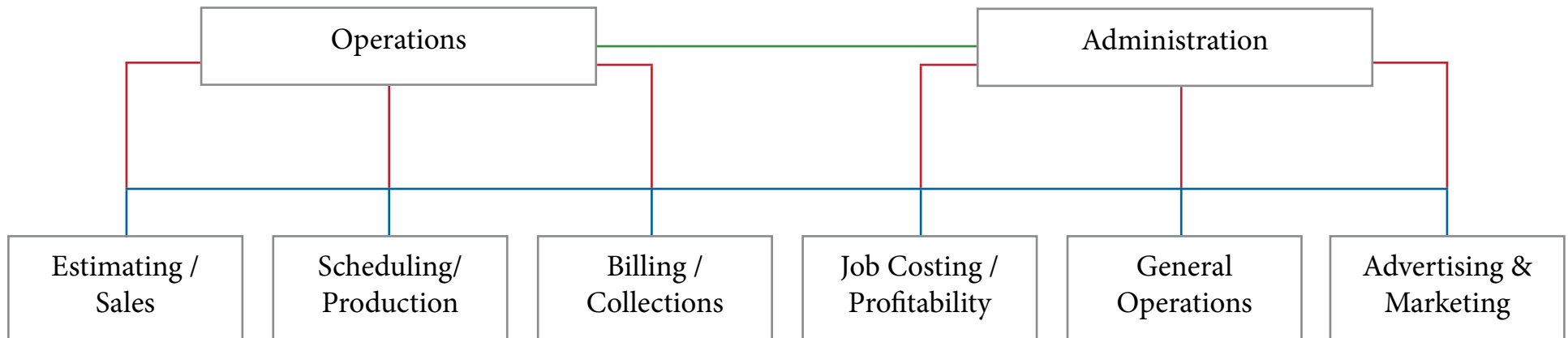
How would this impact the day to day flow of your company?

How would this impact the success of your company?

How do we start the process?



6 Areas of a Service-Based Business



Who Does What?

Current

<u>Estimating/ Sales</u>	<u>Scheduling/ Production</u>	<u>Billing/ Collections</u>	<u>Job Costing</u>	<u>Estimate/ Work Orders</u>	<u>HR</u>	<u>Finance</u>	<u>Marketing</u>
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Future

<u>Estimating/ Sales</u>	<u>Scheduling/ Production</u>	<u>Billing/ Collections</u>	<u>Job Costing</u>	<u>Estimate/ Work Orders</u>	<u>HR</u>	<u>Finance</u>	<u>Marketing</u>
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“Organic Growth with a Strategic Mindset”

What does this look like?

1. Eliminate the “dominos”

- Start with the area that causes you the most stress

2. Start tracking everything (within reason)

- “You can’t manage what you can’t measure”

3. Determine where you best fit **IN** the business

- Craft a plan to delegate the rest (may require a new hire)

4. Work **ON** your business a little bit every day (or at least once a week)

- “How do you eat an elephant? One bite at a time...”

If you have any additional questions, please feel free to reach out to me:

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Preview The Full Circle Customer Course