

Business performance snapshot

Current performance

- Performance on the 3 ways to grow your business
 - Capacity
 - Average client spend
 - Turnover
 - Competition
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New client acquisition activity

- Website activity and performance
 - Traffic generation
 - New clients generated from website
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BTR (Between Ticket Relationship)

- Reminder sequence
 - Methodology and response rates
 - BTR communications
 - Average client lifespan and lifetime value
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Revenue generation

- The business's reliance on sales
 - Monthly recurring revenue
 - Use of ethical upsell techniques
 - Use of client questionnaires
 - How much of the business's revenue is reliant on you personally
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Staffing and you

- Customer satisfaction
- Internal process quality
- Employee satisfaction
- Financial performance
- What would happen if you were taken out of the business tomorrow
- Your desired lifestyle
- Potential exit strategies