

DATE	BUSINESS REVIEW SUMMARY FOR
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Company name	
Address	
Postcode	
Contact name	
Contact position	
Tel	
Mobile	
Email	
www	
Brief description of business	

1. Finance

Section A	Yes	Sort of	No
Is access to finance a barrier in growing your business?			
If NO go to section section B below.			
If YES what would you use the finance for:			
Equipment			
Premises (Improve/relocation)			
Marketing & sales			
Research & Development/developing new products & services			
Providing additional cash flow			
Other (Please state)			
Section B			
Do you:			
Have the tools in place to measure your business performance-e.g. management accounts to control costs and sales performance against targets?			
Regularly chase late payments?			
Get proactive support and advice from you accountant?			
Have a named relationship with your bank?			
General notes:			

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2. Sales & Marketing. Attracting and keeping customers

Do you:	Yes	Sort of	No
Have a formal marketing plan with specific timed & costed marketing activities?			
Have monthly sales targets (e.g.volume, £, number of customers)?			
Offer sales promotions/discounts to generate new sales?			
Have a process to get regular feedback from your customers?			
Is advertising important to promote your business?			
Is there potential to diversify into new markets/introducing new products to grow your business?			
Are you using social media/digital media to promote your business?			
If no , is it the lack of skills in using social media a barrier?			
Are you happy with your website and update it regularly? SEO Strategy?			
Are there up to date Blogs?			
Do you have a Customer Relationship Management (CRM) system in place?			
If YES , is it used effectively to keep in contact with your customers? (new products/offers/news)			
Are you happy with your networking activity to get and maintain relationships with useful people?			
Are you happy with your branding and marketing materials (flyers, brochures, business cards etc)			
General notes:			

3. Using Digital Technology

Do you:	Yes	Sort of	No
Use digital media to contact customers/prospects? (inc using email software like Mail Chimp)			
Able to receive orders electronically? (email, website)			
Able to accept payments online/receive payments electronically?			
Want to improve your efficiency of delivery of your product/service through greater use of technology?			
Need to invest in updating your technology used in the business and need advice on this?			
Have policies and processes in place to comply with the GDPR regulations?			
General notes:			

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4. Leadership and Management Capabilities

Do you:	Yes	Sort of	No
Have a clear business strategy, direction and vision?-A business plan, growth strategy			
If YES do you use and review regularly? Use it in the day to day management of marketing, sales and staff? (i.e. do your staff know what it says and how they can contribute to the achievement of goals?)			
Have clear plans for the future inc. changes in staffing levels, suppliers, new products and services			
Have key performance measures so you know how you (and your staff) are doing and how you/they do it?			
Have regular meetings with managers/staff regarding performance against objectives? (Appraisal process)			
Delegate effectively to your staff?			
Measure performance of your staff?			
Need to develop your management skills to get the best from your staff?			
General notes:			

5. Recruitment and development of employees

Do you:	Yes	Sort of	No
Invest in training & development of your staff?			
Have a staff appraisal system in place to also regularly review staff development needs, attitudes and behaviour (in addition to their performance)?			
Review staff roles to get the best from their skills and abilities?			
Have sufficient HR tools and processes in place to efficiently manage staff, specifically:			
Statements of employment (employment contract)			
Payroll system/software			
Staff Rewards			
Attendance records (sickness, holidays)			
Well Being/Healthy Workplace policies			
Regular staff meetings/surveys			
Staff Pension arrangements			
Job descriptions for each job including key skills needed			
Staff handbook,			
General notes:			

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SUMMARY

After considering the 5 areas above, the priority area you would identify to support your business growth is:

Any general comments

Now please print this form. Save it to your files and forward it to:

info@mertonchamber.co.uk – inserting On Line Business Review in the header

Thank you and we will be in touch soon.