

CatalysCo Customer Journey Transformation Self-Assessment

Catalyzing a customer journey transformation begins with an honest assessment of the state of your customer relevancy today. The questions in this assessment are designed to challenge you and expose opportunity areas for improvement. The resulting clarity, coupled with our proven digital/technical tools and results-orientation fuel quantum growth.

To get the most out of this analysis, follow these steps:

1. Thoughtfully grade the below facets of your business on a scale 1-10, 10 being the best, 1 is worst
2. Be honest with yourself ... it may help to gather input from your employees, partners or spouse when answering some of these questions.
3. Collect your answers on the chart at the end to give yourself a snapshot of your business today.
4. Identify your strongest and weakest areas:
 - a. A rating of "8" or more can be considered a strength.
 - b. A rating of "5" or less can be considered a weakness.
5. Scan and send the completed form to JHeilner@CatalysCo.com for a complimentary review.

The Keys To Optimizing Your Customer Journey

Give yourself a grade of 1-10 in each area, with 10 being the top score. Please circle your grade.

1. Your **product** or **service** is *well suited* to the needs of the current market.
 - a) You are selling, delivering and getting paid for your product or service.
 - b) You are earning a comfortable profit on sales.
 - c) Your customers are happy.

Grade: 1 2 3 4 5 6 7 8 9 10

2. You have a complete, up-to-date business plan to guide your operations.
 - a) You have analyzed your business and your market and you have a complete plan for sales, marketing and business operations.
 - b) You have planned out every detail of your business and you (and your team) work your plan each day.

Grade: 1 2 3 4 5 6 7 8 9 10

3. You leverage digital/technology solutions to integrate the systems within your enterprise.
 - c) You have a "working website" that actively captures visitor contact information.
 - d) Internal software solutions (ERP, CRM, etc.) capture, manage, and segment your database and help automate the process of nurturing prospects into clients into revenue/profit into loyal brand champions.
 - e) You are a measurement-oriented enterprise with constantly updated dashboards containing key metrics for business health and growth.

Grade: 1 2 3 4 5 6 7 8 9 10

4. You have done a complete market analysis of your products or services and their most attractive features.
- a) You have determined your competitive advantage in your market and are prepared to exploit it.
 - b) You have a complete advertising, marketing and promotion plan for your products or services.
 - c) You have a complete sales methodology and process to achieve the sales targets you have set.

Grade: 1 2 3 4 5 6 7 8 9 10

5. You have deep insights into your consumers across every touch point in their interaction with your brand / company, across the entire customer journey.
- d) You have identified each touch point through which your consumers interact with your company/brand across the entire customer journey.
 - e) You have mapped and quantified the impact of each touch point through the customer journey with your company/brand.
 - f) You have optimized your ongoing omni-channel interactions with customers, from acquisition to online and offline customer experience to loyalty evangelism.

Grade: 1 2 3 4 5 6 7 8 9 10

6. There is strong momentum in sales and a continual emphasis on ROI-based or profitable marketing.
- a) You follow a written marketing plan that generates a steady stream of qualified leads.
 - b) You have specific sales targets that you are committed to meeting ... daily, weekly, monthly.
 - c) You have a successful sales process that turns prospects into customers most of the time.

Grade: 1 2 3 4 5 6 7 8 9 10

7. Everyone in your company thinks continually about acquiring, satisfying and keeping customers in order to acquire more customers.
 - a) The purpose of a business is to create and keep a customer; all profits come from that.
 - b) Customer satisfaction is the only measure of business success in the long term.
 - c) Your customers are so thrilled with your business that they recommend it unreservedly and without you asking.

Grade: 1 2 3 4 5 6 7 8 9 10

The more you practice the 10 reasons for business success, the greater will be your sales and profitability.

Area	Customer Relevancy Score									
Your Score	1	2	3	4	5	6	7	8	9	10
1. Product Fit										
2. Business Plan										
3. Tech/Digital Systems										
4. Market Analysis										
5. Customer Journey										
6. Sales & Marketing										
7. Focus on Cust. Acquisition										

Total Score: Add all numbers and divide by 7. Score: _____

Your business should average "7" or more. One key weakness can be enough to severely limit your revenue potential, brand equity, and future business viability.

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