



rate my  
**readiness!**<sup>TM</sup>

Company X

market ready  
assessment

Results and Recommendations

**roobix**   
On demand business development solutions

11 July 2014

## Overall Readiness Score of Company X is 4

Your overall score is an average rating  
Based on all questions and Roobix' research



### Summary

Company X has a strong brand identity, however is failing to generate inbound leads due to poor web presence and lack of effective lead generation campaigns. Though Company X have a sales team they're not following a defined sales process and therefore leads may be lost due to poor and ineffective follow up.

### Individual Score Dashboard



#### Strategy

- Lack of planning on Business Development activity
- No defined budget



#### Sales

- Active sales team but no defined process
- Pipeline is not holistic and only captured by individual sales personnel



#### CRM

- No single database for client data
- Risk of losing information if staff leave



#### Comms

- Receiving customer feedback
- Regularly sending newsletter but no PR activities



#### Brand

- Well represented brand
- Consistent messaging
- Staff clear on company pitch



#### Online

- Online presence not visible in search results
- Not mobile ready

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## Strategy Drill Down



2

Planning marketing spend and expected outcomes is crucial to business growth. Company X does not have a defined marketing budget.

However they do undertake regular marketing activities. Without defining spend it's difficult to measure the success of each activity.

In addition company X does not have a defined marketing or sales strategy for the business.

### Recommendations

- Complete one page marketing activity statement for the financial year and allocate budget to each activity
- Determine key business lines that need to be promoted and factor them into activity/campaigns
- Align sales strategy to marketing activity to ensure full benefits are realised

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## Sales Drill Down



6

Although company X have a dedicated sales team, they are not centrally capturing leads to maintain the business pipeline.

This is a risk for the business as opportunities are retained by the sales personnel not by the business and would be at risk should that individual leave the organisation.

### Recommendations

- Define a set sales process and ensure sales staff are trained
- Create clear centralised pipeline overview enabling reliable revenue forecasting

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## CRM Drill Down



2

Company X does not maintain a Customer Relationship Management (CRM) system. Currently the only data store for client records is the accounting system.

Potential client data is only kept in spreadsheets and maintained by the sales team. The lack of CRM system is the key factor behind the sales pipeline issues experienced by the business.

### Recommendations

- Implement pay by month CRM system to capture all customers (client and potentials)
- Implement opportunity and lead capture process for CRM to develop pipeline
- Capture key client information to improve communications

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## Comms Drill Down



5

The sales team ensure existing clients are communicated to regularly.

The company newsletter is distributed monthly but is not tracked, so open rates, read rates and click rates are not monitored or pursued.

Company X regularly surveys clients and requests feedback on completed work.

### Recommendations

- Distribute eDM (electronic Direct Mail) using email tool that allows tracking for improved lead generation
- Investigate pro-bono sponsorship opportunities

## Brand Drill Down



6

Company X brand identity is very strong and well represented.

The business is confident that its unique selling proposition is understood by staff and key messages are clearly articulated.

### Recommendations

- Increase brand profile through sponsorship and regular PR activities

## Online Drill Down



4

Company X's website is missing the essential elements required to maintain a strong online presence thus, does not rank in the top three pages of google in 5 key word searches.

Simple web elements such as meta data and mobile device responsiveness have not been implemented. The site is not generating leads though the key services of company X attract strong online search results.

### Recommendations

- Invest in new basic website with Content Management System (\$2500 - \$3500) to improve search results
- Implement Google for business to improve local search results
- Implement simple 'call to action' strategy and web forms to obtain direct leads from website
- Increase content to improve ranking results

## What now?

Now that you are armed with all this new information about the performance of your business, you can implement the recommendations to take your business to the next level. In the near future we will give you a call to see if you would like to chat further about these findings.

If you can't wait, please give us a call on **1300 664 957** or drop us a line on [info@roobix.com.au](mailto:info@roobix.com.au)

Roobix is a Western Australian out sourced marketing organisation, specialising in brand awareness and lead generation for small businesses on small budgets.