

## Step 1 – Flash Consulting To Identify Customer and Situation Goals

1. Where are you now in terms of revenue? \$ \_\_\_\_\_
2. Where do you want to be in terms of revenue? \$ \_\_\_\_\_
3. How long have you been working on that goal? \_\_\_\_\_
4. **Number of Sales Reps? \_\_\_\_\_ Deals per Rep/Month** \$ \_\_\_\_\_
5. **Average gross profit per sale?** \_\_\_\_\_
6. **Number of Years Customer Stays with You?** \_\_\_\_\_
7. **Average # of Purchase per Year From Each Customer** \_\_\_\_\_
8. Number of possible Sales Days (you are open for business) 220 Days
9. Number of Leads per Month generated from existing
  - a. Advertising \_\_\_\_\_ b. Cold Calling \_\_\_\_\_
  - b. Other (Referrals, Trade shows etc.) \_\_\_\_\_
10. **Average Close Ratio Per Rep** \_\_\_\_\_
11. Percent of One Call Closes per Representative per Month % \_\_\_\_\_
12. Average Sales Cycle in Days/Weeks/Months \_\_\_\_\_
13. How Many Total Customers Have You Sold \_\_\_\_\_
14. What timeframe does your company use for as an acceptable Return on Investment ROI) for Software Purchases? \_\_\_\_\_
15. What is your decision making Progress? Please Explain...

## Step 2 - How Many More Leads Per Rep/Month Could You Generate if:

1. All new Prospects that Literature was sent to were called back? \_\_\_\_\_
2. All Prospects in Wait Mode Were Followed Up when Promised? \_\_\_\_\_
3. All Proposals were followed up on for a decision? \_\_\_\_\_
4. **All new clients were systematically asked for referrals? (Use In ROI below) # \_\_\_\_\_**
5. All of your customer base was offered cross selling and up selling opportunities for all the other products or services you offer on a continual basis? \_\_\_\_\_

**Total New Leads Per Rep Per Month** \_\_\_\_\_

## Step 3 – Determine ROI Calculations – Does It Pay For Itself?

### Potential New Profit from New Leads Generated Per Month Per Salesperson

Total new leads per Salesperson /month <b>Times # of Reps (Q-4 Above)</b>	Multiple <b>(A-1)</b> By the Gross Profit Per Sale <b>(Q-5 Above)</b>	<b>(A-2)</b> = Total New Profit per Month Multiplied by the Closing Ratio <b>(Q-10 Above)</b> = \$ Increased Profit Per Month
<b>(A-1)</b>	<b>(A-2)</b>	<b>(A-3) \$</b>

### Life Time Value by Cultivating and Nurturing the Existing Base

Increased Profit Per Month <b>(Use A-3)</b>	Multiplied by- # Purchases Per Yr per Client <b>(Q-7 Above)</b>	Multiplied by- # Yrs As Client <b>(Q-6 Above)</b>	= Lifetime \$ Value of a Client	# of Referrals – With same profit rate <b>(Step 2-4 Above)</b>	Total Lifetime \$ Value of a Client
\$			\$		\$

**Total Life Time Value of a Client Multiplied By Number of Clients = More Life Time Profit of \$ \_\_\_\_\_**