



COMPANY BASELINE ASSESSMENT

COMPANY INFORMATION & OUTLOOK
Type of business: <input type="checkbox"/> B2B Manufacturer <input type="checkbox"/> B2B Service or Logistics Provider <input type="checkbox"/> Other _____
Industry Type: <input type="checkbox"/> Technology products or services <input type="checkbox"/> Manufactured products or services <input type="checkbox"/> Service only provider <input type="checkbox"/> Other _____
Gross Sales Volume: <input type="checkbox"/> Between \$1 and \$5 Million <input type="checkbox"/> Between \$5 and \$50 Million <input type="checkbox"/> Over \$50 Million
Workforce Level: <input type="checkbox"/> Under 20 employees <input type="checkbox"/> Between 20 and 100 employees <input type="checkbox"/> Between 100 and 250 employees <input type="checkbox"/> Over 250 employees
Business Performance Status: <input type="checkbox"/> Trending up <input type="checkbox"/> Matching forecast / Having some issues <input type="checkbox"/> Matching forecast / Having long-term growth concerns <input type="checkbox"/> Trending Down
Your Company's Position in the Marketplace: <input type="checkbox"/> Leader <input type="checkbox"/> Middle of the pack <input type="checkbox"/> Losing ground
Rank the following marketplace threats facing you in 2022: ____ Domination of e-commerce platforms like Amazon or Alibaba ____ Supplier pricing, delivery and performance issues ____ Inability to pass escalating costs unto customers ____ Keeping up with tech savvy competitors



COMPANY BASELINE ASSESSMENT

EMPLOYEE TEAMS

Regarding your existing workforce, have you ever? *(check all that apply)*

- Used employee teams
- Used team building activities for training purposes
- Used smart or I-Pads for communications or training purposes
- Used vendor provided software for training purposes

Regarding your existing workforce, can you identify?

- Tech-savvy individuals

- Team leader candidates

- Potential peer trainers

Regarding your workforce culture?

- Do you use an outsider generated culture assessment program?

- Do you have an employee recognition program?

- Are your workforce employees involved with sales process?

How would you score your current workforce technology capabilities?
(check all that apply)

- Lower than our competitors technical capabilities
- Higher than our competitors
- Below our desired company standard
- Exceeding company expectations



COMPANY BASELINE ASSESSMENT

BUSINESS SYSTEMS AND SOFTWARE

Technology Roadmap

- Have you created and/or use a technology roadmap?

- Do you have M2M communications?

- Do you use cloud-based data collection systems?

- Do you have systems links between your ERP and CRM?

Do you have an ERP system? Yes No

If so, name: _____

Do you have an MRP system? Yes No

If so, name: _____

Do you have a CRM system (i.e., Hubspot)? Yes No

If so, name: _____

Do you utilize any of the following types of digital platforms?

Data Analytics Yes No Name: _____

Website Yes No Name: _____

Email Marketing Yes No Name: _____

Have you created and/or use a performance tracking dashboard?

Yes No If so, name: _____



COMPANY BASELINE ASSESSMENT

MARKETING & SALES

Digital Marketing Strategy

Does your marketing vision have a digital advantage strategy?

____Yes ____No

Do your competitors have a technology or digital advantage?

____Yes ____No

E-Commerce / Customer Communications

Do you use a Chatbot? ____Yes ____No If so, name: _____

Can customers access product status via smart phone? ____Yes ____No

Is your customer's first connection with your company done via email?

____Yes ____No

Are your product(s) displayed on social media? ____Yes ____No

Are customers able to use your website to place an order? ____Yes ____No

Is your competitor's e-commerce strategy superior to yours?

____Yes ____No

Related to Marketing Systems, do you have:

- Email marketing software
- Blogging software
- Tracking of customers who access your systems

Other Relevant Information Shared



COMPANY BASELINE ASSESSMENT

CONTACT INFORMATION
COMPANY NAME:
COMPANY REP:
PHONE / EMAIL:
INTERVIEWER NAME, DATE AND TIME:
ANY ADDITIONAL NOTES: