

Is Your System Working for You?

A scorecard is used to measure your effectiveness in specific areas. You will identify areas of strength and those that could use improvement. Using the System Scorecard, rate how well you are using your database to save time, keep organized, build and maintain relationships. Calculate your overall database score by adding up the values for all statements and indicate your score in the bottom row provided. Review the statements that have the lowest scores and consider how you can enhance your system.

	Performance Score On a scale of 1 – 4, with 1 being lowest and 4 the highest, rate how well does your system work?			
	1	2	3	4
Do you have a central location for storing contact information for your customers, vendors and prospects?				
Can you segment your contacts into different groups? (customers, vendors, prospects, etc)				
Can you send personalized letters to one contact or a group of contacts in your database?				
Can you use your database to schedule follow-up calls and mailings to your clients and prospects?				
Are you entering contact information into more than one place? (For Example: Outlook, QuickBooks, Excel)				
Do you have a reliable birthday reminder system for family and clients?				
Do you know who you should call today? This week? This month?				
Do you maintain accurate records of all your interactions with clients and prospects?				
Can you forecast and track sales opportunities to improve your results?				
Can you take your information "on the road" - either in printed form or a PDA?				
Can you customize your database to track pertinent information for your business/industry?				
Can you track where your leads are coming from? How many leads turn into clients?				

Overall System Score:

WHAT YOUR RATING MEANS:

- 43 - 48 points: You're doing great. Share your skills with others.
- 42 – 36 points: You're using a system, but it could be improved.
- 35 – 26 points: You're putting in more effort than you need to.
- 25 or less points: You need a system!