

**** This is a MASTER document,
please make a copy before using ****

version 7.00 February 29, 2024

CONGRATULATIONS!

By you using the X-Rays to grow your business, you will...

Increase your INCOME!
DECREASE the number of HOURS you work!
Increase the amount of work you get done!
Work with higher QUALITY individuals!
Work with top professionals FASTER!
Get more done in less time!
Have better balance in life!

Please Do The Following For Best Results:

1. Complete pages 4 and 5. (multiple-choice questions)
2. Make sure we can read your e-mail address and e-mail address of sponsor (if applicable).
3. Use most current version of interview.
4. Fax over your business card along with that of sponsor (if applicable).
5. Make sure all information is easily readable.
6. Complete as much of page 6 as possible.

Note: If you plan on using ActionVision or placing the individual you sponsor on ActionVision, complete the full X-Ray (request further information from your certified consultant). Please make sure you are using version 6.03 or higher. For most current version, go to:
<http://www.synergysolutions.net/NewFiles/B1c-business.html>

ActionVision Business "X-Ray"

Interviewer: _____ Scheduled Date for X-Ray Review: / / to / / () - interviewer's time

Please attach your **BUSINESS CARD** & fax completed X-Ray to analysis center: (630)393-9901

Interview Date: / / Time: : : Amount: \$ S&H: \$ Total: \$

Name: _____ Bill To: **Referred, Sponsored, Certified Consultant,** _____

E-mail: _____ Name: _____

Company: _____ Company: _____

Work Phone: () - ext. Address: _____

Fax: () - City: _____

State: _____ Zip: _____

- Business - Home Address Good to have Check will be sent.

Credit Card Number: _____

Home Phone: () - Billing address: _____

Pager: () - Exp. Date: / /

Interviewee **Sponsor** (signature & attach your business card.)

[] Send via []-Post Office-Priority, Pick-up, Deliver Send via []-Post Office-Priority, Pick-up, Deliver

[] UPS, []-FedEx ()-2 day, ()-next day [] UPS, []-FedEx ()-2 day, ()-next day

[]-Send client to client, []-sponsor to sponsor, // []-Send client and sponsors copy to sponsor for sponsor to give out.

[] Use clients #: _____ [] UPS, []-FedEx ()-2 day, ()-next day

This business evaluation\ "X-Ray" has been designed to provide your certified consultant with enough basic information to conduct an analysis of your current business and provide you with a snapshot of the overall health of your business and your potential for the next twelve months. This evaluation will also assist you in identifying key areas where a minimal amount of effort can give you the best return on your investment of time and money. **It will help you to increase your income and decrease the number of hours you need to work!**

While this evaluation is a good tool, it is not to be used as a replacement for a knowledgeable consultant who can fine tune and factor in other areas that are difficult to measure by a limited, written evaluation model. For **best results**, review all information and analysis with a certified ActionVision consultant.

All your "professional" referral sources (accountant, financial planner, attorney, insurance agent, doctor, Realtor, etc.) have the capacity to refer business to you on a consistent basis. If you **do not** have any professional referral sources, you **may skip the first 9 questions on page 3**. Past and current clients do refer business to you but are not considered to be referral sources during this business evaluation.

For the purposes of this business evaluation, we will refer to your top professional referral sources as "A's." (Ideally the "A's" should be 15% of your total referral sources.) Your "B" referral sources will be the next level. (Ideally you should have twice as many "B's" as "A's.") The remainder of your referral sources are your "C's." (Ideally you should have twice as many "C's" as "B's.")

A prospect is anyone who has expressed interest in your product or service and has provided you with his or her name and phone number.
NOTE: Only pages 3 and 4 are required; however, completing all other pages will greatly assist your ActionVision consultant in providing you with the best and most accurate analysis.

Analysis Center Use Only:

Presented By: _____ Certification Number: _____
X-Ray Developed By: _____ Certification Number: _____
Analysis Completed By: _____ Certification Number: _____
Date X-Ray given: ____/____/____; Completed (pg 1-5): ____/____/____, totally: ____/____/____; Submitted: ____/____/____ am/pm
Consultant requested Date: ____/____/____, X-Ray sent: ____/____/____; Reviewed: ____/____/____, Next Action Faxed: ____/____/____
[]-12/sales contact: ____/____/____, []-12/RDS: ____/____/____, ActionVision interview date: ____/____/____;
ActionVision plan submitted: ____/____/____, ActionVision plan completed: ____/____/____; Monthly reviews started: ____/____/____

Monthly AV reviews will be completed by: _____ Phone (____)____-____ Cert. #: _____

Monthly Contact: Jan:____, Feb:____, Mar:____, Apr:____, May:____, Jun:____, Jul:____, Aug:____, Sep:____, Oct:____, Nov:____, Dec:____
Completed By: _____, _____, _____, _____, _____, _____, _____, _____, _____, _____
Client Would Like Completed By: ____/____/____ Interview Date: ____/____/____ Time: ____:____

NOTES to X-Ray interviewer

1. Review over all MCAT notes / data before doing the interview.

2. Learn their business.

If interviewer does not know what type of business the person is in, then start off with . . . introducing yourself and then the normal intro . . . and then . . . ask some of these:
--So . . . before we get started on the X-Ray questions, tell me a little about yourself and your background and your company.

-- Where do you find your prospects?

-- How do you get most of your Business?

Set the "context" of the business they are in, so you can adjust the questions as needed to fit their business model

You are like a doctor asking the patient to become naked in front of you. Let's make sure we are sensitive to this and doing it properly and with consideration. Warm them up some. Watch for the Warm Belly Rub in a huge way. Be very careful and considerate.

For example, they have an employee who wants to start another branch really bad. The thing that closed the sale is MARK sharing that it would be great for the employee could sit in on the review. If there are things she shares with you, in any part of the X-Ray, that she does not want shared with her employee, she needs to let you know so you can let

MARK know. Make sure you get a feel for their business and what they do, what they are looking to do.

3. Close the AV sale while doing asking the questions in the X-Ray interview. (the assumptive close :-) Learn a few comments you can add to the questions to “share” how Action Vision can help them with that part of their business.

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Additional Questions that can be asked from an Area 3 Perspective

> Check with Mark first before using in each interview!

Name: _____ **PLEASE CIRCLE THE BEST CHOICE**

REMEMBER: *See NOTES to X-Ray interviewer above*

Warm Belly Rub BEFORE jumping into questions:

"(Client name), this is (name of interviewer) with Synergy Solutions and I look forward to doing your X-Ray interview today. :-) Before we get into the interview itself, Mark shared some about you and I've reviewed over your notes, but I like to hear directly from our client what they do, what they love about what they do and some of their challenges / what they would like help with before we get into the X-Ray interview."

The first section is multiple choice - I'll read the question and the three potential answers, what I need you to do is choose the answer that most closely corresponds to where you/your business are at.

1) To how many "A" professional referral sources do you bring added value services and/or products on a monthly basis?

- A) 5 to 20 individuals.
- B) More than 20.
- C) Zero to 4 or "What are added value services?"

2) About how many of your top professional referral sources do you know the following key information: the percentage of their total business you receive now, who your biggest competitors are, why your competitors get their business, what their business goals are during

the next twelve months and how you will help them reach those goals?

- A) Most or all.
- B) Some.
- C) None.

3) How often do you personally visit your "A" professional referral sources and ask, "Can I help you in any area of your business?" and/ or "Can you give me the names of several individuals with whom you are currently working that I might be able to assist?"

- A) Weekly, and I ask for referrals nearly every visit.
- B) As often as possible and some of the time I ask for referrals.
- C) Not very often, and they know I need referrals so I do not ask.

4) How often do you phone your "A" professional referral sources?

- A) Very often.
- B) Probably not as often as I should.
- C) Not very often, and I am inconsistent.

5) How often do you phone your "B" professional referral sources?

- A) Very often.
- B) Probably not as often as I should.
- C) Not very often, and I am inconsistent.

6) When you phone your "A" and "B" professional referral sources, do you ask them how you can help them increase their business and ask for referrals?

- A) Very often.
- B) Probably not as often as I should.
- C) Not very often, and I am inconsistent.

7) Your consistent, marketing efforts (Direct mail, email marketing, Ads, TV, Radio, etc) to your "A", "B", and "C" referral sources are they designed to:

- A) Build a relationship with your referral sources.
- B) Market yourself and your products.
- C) What consistent marketing efforts?

8) How consistent are your marketing efforts to your "A", "B", and "C" referral sources?

- A) Monthly; they always happen.
- B) Quarterly; they happen most of the time.
- C) I might get something out a few times each year if I am lucky.

9) Do all of your marketing efforts invite your "A", "B", and "C" referral sources to respond? Do they respond?

- A) All the time and some will respond.
- B) Some of the time and/or a few will respond

yearly.

C) Respond to what?

10) If you meet with your clients face to face, do you ask for and receive referrals?

A) I ask all the time, and sometimes I get referrals.

B) I sometimes ask for referrals but often do not get them.

C) I do not ask for referrals.

11) How do you schedule your appointments?

A) I try to schedule clients' appointments around my business schedule (two weeks in advance).

B) I schedule my clients when it fits into their schedule.

C) I really struggle with time management.

12) Do you know enough about your clients to determine if they could be turned into "professional" referral sources?

A) I regularly seek to turn a client into a "professional" referral source.

B) Once in a while this will happen.

C) I have never really pursued this.

13) When you make a phone call to your clients to give them an update, do you consistently ask them for referrals from specific groups with whom they are acquainted?

A) I regularly do this.

B) I could do better at this.

C) I really do not do this very often.

14) Do you regularly call past clients to see how things are going and to see if they need any further assistance?

A) I regularly do this.

B) I could do better at this.

C) I really do not do this very often.

15) Do you have a regularly scheduled time each week for past client contact?

A) I regularly do this.

B) I get to this when I can.

C) I have great intentions, but....

16) On a regular basis, do you send marketing to your current and past clients to build those relationships? (It does not count if you only talk about your company or industry.)

A) I actively use relationship marketing.

B) I send items, but I do not feel they build relationships.

C) What is relationship marketing?

17) How consistent are your marketing efforts to your current and past clients?

- A) I do a great job in this area.
- B) I need to do better.
- C) I constantly fall short in this area.

18) How successful are your marketing efforts in having your current and past clients refer additional business to you?

- A) Very successful.
- B) I am getting some responses.
- C) I am getting very little results.

19) If you had one hundred leads, do you have systems in place which identify and follow up on the top ten leads first?

- A) Yes, I have very strong systems in place.
- B) I could use some improvement in this area.
- C) I would try to keep up with all the leads equally.

20) If you meet with ten prospects in-person, how many will turn into customers?

- A) 7 to 10.
- B) 4 to 6.
- C) Less than 4.

21) If you meet with ten prospects in-person, how many of them will give you additional leads?

- A) 8 or more.
- B) 5 to 7.
- C) Less than 5.

22) How consistently do you follow up on your leads over the phone, and is your follow-up tied to their decision-making/sales cycle?

- A) I am very consistent.
- B) I need to improve in this area.
- C) I am really weak in this area.

23) If you had ten prospects with whom you were following up by phone, on average, how many of those would you turn into clients?

- A) 6 to 10.
- B) 2 to 5.
- C) Less than 2.

24) If you were following up with ten prospects by phone over a two-month period of time, how many additional leads would you generate from them?

- A) 8 or more.

- B) 4 to 7.
- C) Less than 4.

25) If you had ten prospects that did not close immediately, how often would you send them marketing material?

- A) At least monthly for twelve or more months.
- B) I would send them information initially and then periodically.
- C) I probably would not send them anything.

26) If you send marketing materials to your prospects regularly, do those mailings cause them to refer others to you?

- A) Yes; I try to build relationships through my marketing.
- B) Sometimes; I try to sell or inform through my marketing.
- C) I do not send them anything on a regular basis.

27) If you send your prospects marketing materials on a regular basis, does it cause them to take action and/or refer additional business to you?

- A) Yes.
- B) I am not sure.
- C) I do not continue to send prospects anything on a regular basis.

If we don't have their personality in MCAT, you can ask these questions:

Please rate in order from 1 to 4 (with 1 being first) which of the following would cause you the most frustration & which shape you like the most.

- ☐ a. Cube
- ☐ b. Pyramid
- ☐ c. Wavy Line
- ☐ d. Ball
- ☐ A. Things not being accurate or done incorrectly.
- ☐ B. Things being out of control.
- ☐ C. Things not being fun or exciting.
- ☐ D. Conflict with others.

Your birth order: _____ (1 of 2; 3 of 4)

Name: _____ **Other Business Information**

Please fill in as much as possible. The more information you provide, the more accurate your personalized X-Ray will be.

A. What are your income goals for the next twelve months?

Minimum: \$

WOW goal: \$

Income YTD \$
Income in 2023 \$
Income in 2022 \$
Income in 2021 \$
Income in 2020 \$

B. 1. Sales Closing Ratio: (If you had ten **leads** how many transactions would you write?)

_____ EX. 4/10 = 40%

2. Final Closing Ratio: (If you wrote ten transactions, how many would close?)

_____ EX. 4/10 = 40%

Commission

C. Avg. Transaction Size:

Your Avg. Commission Per Transaction:

- *Not every industry will have a commission, most often you will see a commission in the mortgage or real estate industry, so this question might not apply to every BXR Interview you do.*

D. Balancing Life Questions -

Number of years in business: _____

1. What would be your **biggest challenge** in increasing your business by 25% to 50%, or in getting to your "WOW" goal, and maintaining the best balance in every area of your life? _____ **(Please limit answer to 5 words, as the space on the final is limited)**
2. On average, how many hours per week **do you** currently work? (please circle)
Less than 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, more than 65 -
3. How many hours **would you like to be** working to maintain the best balance in every area of your life?
Less than 10, 15, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, more than 65 -
4. Please rate (1 to 10, with 10 being greatest) your level of interest in having tools available to you that could help your business **grow by 25% to 50%** and **reduce your work week by 10 to 15 hours** by putting systems in place that work when you are not working. **1 2 3 4 5 6 7 8 9 10**
5. When do you plan to implement systems to build a more efficient business?
A. [] Immediately, B. [] 1-2 months, C. [] Other _____
6. If you had an extra 10 to 15 hours per week and earned \$50,000 to \$150,000 more in income, what would you do with that extra **time** and **money**? _____ **(Please limit answer to 5 words, as the space on the final is limited)**

*** Depending on the earnings that you captured above, you might need to adjust the \$50k to \$150k number (for example: if they are earning \$1.5 million and want to earn \$3 million, you'd want to adjust to a larger number of \$500,000 to \$750,000)*

7. A. Married: Y _____, N

If Married: Name of Spouse _____

If Married: One thing that would improve your relationship _____

- B. Children: ("Do you have any children? If they answer yes, we ask how many.") _____
- C. One thing that would Your relationship with your children. _____

E. Client/Prospect Information:

How many sales consultants (or employees) are **employed by your company?**

1. Number of **past clients:** _____
2. Are their addresses and phone numbers current? ☐ **Yes**, ☐ **No**
3. If you do not know their address and phone number, could you get that information?
☐ **Yes**, ☐ **No**
4. Are they on a database? ☐ **-Yes**, ☐ **-No**

Name of software you are using: _____

3. Number of current clients: _____
 4. Number of current prospects: _____
 5. **New prospects monthly:** ____/ month
 6. new prospects in the last: **6/mo.**____,
 7. How often do you contact your database by mail? **Mail:** ---_ **wk./mo./yr.**
How often do you contact your database by phone? **Phone:** ____ **wk./mo./yr.**
 8. Does every prospect get entered into a database immediately? ☐ **-Yes**, ☐ **-No**, ☐ **-Most of the time**
 9. How often do you contact every prospect by mail ____/ and phone ____/?
 8. Where do most of your leads come from? _____
 10. On average, what percentage of your total available business are you receiving from your clients? _____%
 11. How much money have you invested into your business in the last: 12/mo. **_\$**____
 12. Do you have a written business plan? Yes _ No _
- IF APPLIES: How often do you review: ____/**wk,mo,yr**)
- Interest in developing a written plan. ____ (1-10, 10-best)
- Dollars you believe need to be invested to achieve WOW income goal working the hours you want to? \$_____/start \$_____/mo Time: ____/wk-

13. Rate the following: (1-10, 10-most, current/would like)

'Ok, so this is our final section of questions - these have to do with Business / Life balance. I'm going to run through a bunch of different categories, and I need you to rate for me, 1-10, where you feel like you're at currently and 1-10, where you would like to be at.'

- A. Stress:
- B. Life Balance:
- C. Family:
- D. Personal Time:

For Work: "These next questions apply to your work, so, 'how would you rate your personal discipline as it applies to your work?' "

E. Personal discipline:

F.Consistency:

G.Passion for success:

H.Willingness to invest \$ into yourself:

I. Push yourself:

J. Achieving your full potential:

K. Spiritual:

would you like input:

- We ask, *"Is this something you would like input from Mark (or whoever is doing their BXR Review) on?"*

L: Motivation:

M. Marriage:

How your spouse rates your marriage:

N. Relationship with Children:

O. Self-confidence:

P. Self-esteem:

Q. Self-worth:

(as it relates to achieving your full potential)

i. passion:

ii. proper knowledge

iii. actions

iv. self discipline

R. Time management:

S. Organization:

T. Focus:

U. Follow-through:

V. 1-10 how would you rate your level of Procrastination:

W. Handle details well:

X. Control situations well:

Y: 1-10 (currently and like to be) how would you rate yourself in Exciting others around you:

Z. Sensitive to feelings of others:

ae. Positive attitude:

af. Proper confrontation: *(if they need additional explanation, you can say, "In the situations where you need to use proper confrontation, how would you rate yourself 1-10, where you are currently and where you'd like to be.")*

ag. Positive thinking:

ah. Negative guilt:

ai. Patience:

aj. Financial plan:

ak. Money management:

al. Enjoy current position:

am. Company support:

Tools to Save You Time:

an. Referral Development:

ao. Technology:

ap. Business Library (resources to draw from for info):

aq. MultiMedia:

Life Style

ar. Physical Fitness routine

as. Dietary Habits

Aa. Setting goals:

ab. Proper prioritization:

ac. Control emotions:

ad. Control over feelings:

Finished

BEFORE SCHEDULING REVIEW MAKE SURE TO ASK...

1. If, after the X-Ray review, you decided that you were interested in moving forward, with any of our more advanced systems would you be the decision maker or would you need to confer with anyone else? []-Yes, []-No If Yes . . . name: _____/Relationship: _____

2. If so would it probably be a good idea to have them sit in on your review? []-Yes, []-No

(If the client's following ratings, has a spread of 6 points, with the final interest of a 7 or higher enter into the appropriate prospect group and notify the product executive)