

Integrated Company Assessment

Your Business

1. What are the KPIs about your business that matter most to you?
 1. What are your most & least profitable products, features, or services?
 2. What is your typical profit margin on your product/service?
 3. Applying the 80/20 rule to your business: do you know the 20% of your customers account for 80% of your revenue?
2. How do you know what success looks like for your customers?
 1. Do you have User Experience KPIs?
3. What do you WANT for your business?
 1. What is your business goal right now?
 2. What one question do you need to answer in order to move forward and get un-stuck?
4. What do you want more/less of?
 1. More customers (Audience Growth) - Same market? New market? New country?
 2. Repeat purchases (Audience Retention/Referrals)
 3. Charge more for your product or service (Innovation)

Your Customers or Clients

1. Who are your target customers? (AUDIENCE)
 1. What countries or markets are your customers in?
 2. Are you planning to expand your market share to another state or country? Which ones?
 3. Who are your largest customers? The ones that purchase from you most and that you wish everyone was like?
2. Who is your DREAM customer?
 1. What do your customers dream about when using your product or service?
 1. What is their ultimate goal?
 2. What do your customers most desire?
 3. What are their motivations and drivers for choosing your product/service in the first place?
3. Why is your dream customer not buying from you? (MAGIC)
 1. Why does your dream customer purchase/use your competitor's product instead of your product or service?

Your Product or Service

1. What does your company sell? (SOLUTION)

1. How many products or services do you have?
2. How do your customers evaluate your product?
 1. How easy to use, or efficient, is your product/service? How do you know?
 2. Are your customers happy with your product/service? How do you know?
 3. Do you know what your customers are unhappy about with your product/service? Have you acted on this information?
3. What is the principal pain point your customers have that your product/service is the solution to? (PROBLEM)
 1. Are there other pain points you know about that your product or your competitor's product do not currently solve?
 2. Does your product/service solve a known problem in the industry?
 3. Does your product/service solve an unknown, or new, problem that no other product in your market is solving?
4. Who are your competitors? (COMPETE)
 1. What does your product or service do for your target audience better than your competitors?
 2. What do your competitors do better than you?
5. Does your product/service actually do what you say it does? (PRODUCT TRUTH)
 1. Does your product/service do what your customers want it to do?
 2. Does your product/service do what your customers need it to do?
 1. (Sometimes, customers don't know what they truly need, so they might ask for something, but really need it to do something else. Do you know if this is the case?)

Wrap-Up Questions

1. Based on the questions above, what are your top 3 Opportunities / Takeaways from going through this exercise?
2. What is your biggest knowledge gap about your customers? How can you start to inform it?
3. What is the first thing you need to do to take a step forward?