



Business Model Optimizer - sDNA

Company: *JS Financial*

Target ⇄	Problem ⇄	Solution ⇄	Insight into the Target ↓
<p>Why is the person or situation for which your company is always the best choice?</p> <ul style="list-style-type: none"> • 500K to 3 million • Professional with 100K income • Professional i.e. Physicians • Business owners with money 	<p>What is the problem your products/service solves? How high is it on the prospects list of pain points?</p> <ul style="list-style-type: none"> • What happens when people die? –Insurance • Concerns of wealthy people- Mutual funds for retirement 	<p>How does your solution solve the problem in a meaningful way-which the competition cannot do?</p> <ul style="list-style-type: none"> • Trust 30 year in the business • Business health of mutual funds partners • Information resources of both partnerships • Online staff resources 	<p>What insight do you have into the target's needs, wants and desires and frustrations?</p> <ul style="list-style-type: none"> • Understanding of Business issues • Understanding of tax issues • Business acumen
↓ Conversion Rates	← Sales Engine	← Go to Market Strategy	← Differentiator Wow
<p>How many in each category today? List conversion rates for each category:</p> <ul style="list-style-type: none"> • Suspects Low • Leads 10% • Qualified leads Low • Proposal/ Pricing Presented 90% • 1st time Buyers 90% • Repeat Buyers 70% • Evangelists 5% 	<p>What is the sales process?</p> <ul style="list-style-type: none"> • Need action plan for all elements of the sales process 	<p>What is the company's current go to market strategy? How does it engage suspects, convert to prospects, accounts, clients, and evangelists?</p> <ul style="list-style-type: none"> • Need go to market strategy • Need to have strategy for new on line sales funnel and convert 57 new leads 	<p>What does your brand do that causes it to stand out in crowded market place?</p> <ul style="list-style-type: none"> • Brand needs building • Need elevator speech-personal marketing • Need to develop brand in different marketing channels • Need to develop brand in changing culture based on reputation • Need to stand out in a crowded market place and use experience and available resources
Team DNA ⇄	Thermostat ⇄	Trajectory and Vision ⇄	Sustainability and Scale
<p>Is the team optimized by DNA for the roles they have?</p> <ul style="list-style-type: none"> • Current staffing profile is in support role or administration 	<p>How satisfied are you with current growth? What do you want the growth to be in 5 years?</p> <ul style="list-style-type: none"> • Want to move business to \$50M • Currently increasing by ~\$4M and want to move to \$10M a year • 400000 per/client in mutual funds • 15,000 p/m—Insurance sales • Spillage?? 	<p>Map your historical revenue to date and map your vision for 5 years:</p> <ul style="list-style-type: none"> • Need to develop KPI structure that supports growth plans. • Need plan of action in sales engine that drives KPI structure. Need defined actions in the sales process. i.e. Add on selling during sales category 	<p>What is your plan for sustainability and scale?</p>