



Check Your Vitals!

In order to have a profitable, sustainable business, you've got to have buyers for your offers. They don't appear out of thin air. They find you somewhere along the buying path:

Stranger => Interest => Lead => buyer => Offer delivery => repeat buyer => referral source

This worksheet can help you get clear on how buyers find you, how money is actually made in your business, and what it takes to earn that business! Then, you can stop tracking vanity metrics and track the metrics that matter most to the health of your business.

1. How do you actually make sales happen in your business?

- A. I (or my team) have an actual conversation (in person or face to face) with the buyer.
- B. I send an email and they click a link to buy.
- C. I use social media channels to drive online sales (specify each channel).
- D. I send a proposal, they sign a contract, then they pay me.
- E. They visit my website and click a link to buy.
- F. They walk into a physical location and buy from my store.
- G. I get in front of audiences and they buy what I offer during my presentation.
- H. I use affiliate/JV relationships to sell my offers.
- I. Crowdfunding.
- J. Something else (be specific).

2. Which of those activities provides the best results (sales) for your business?

3. How do you generate leads for those activities?

- A. I create content and share it on social media (specify each channel)
- B. I create content and share it via direct mail.
- C. I create content and share it on my website.
- D. I create content and share it through other websites (guest posts, blog comments, etc.)
- E. I use a product launch model
- F. I host events
- G. I speak on other people's stages (podcasts, media appearances, live or virtual events, etc. - specify each channel)



- H. I advertise (specify).
- I. I offer free consultations/sessions.
- J. I use an aggregating platform (like crowdfunding or online course/subscription sites - please specify).
- K. I extend personal invitations to buy/try my offers.
- L. I use networking (online/offline - please specify).
- M. I use affiliate/JV relationships to create leads.
- N. I have an eye-catching physical product display.
- O. Something else (be specific)

4. Which of those activities provides the best results (qualified leads) for your business?

5. How do leads find out about you in the first place?

- A. I advertise (specify).
- B. I invest time answering questions in social groups (online or off, please specify).
- C. I volunteer.
- D. My social media channels (be specific).
- E. I talk about my business everywhere I go.
- F. Word of mouth from my previous clients.
- G. Word of mouth from my colleagues or peers.
- H. I have a physical location in a high-traffic area.
- I. I am regularly featured in the media/on other people's websites.
- J. I speak/perform at live events (online or off - please specify).
- K. Search engines.
- L. Referral/ loyalty/rewards marketing.
- M. Something else (be specific).

6. Which of those activities provides the best results (interest/list growth) for your business?



7. How much does it cost to acquire a new buyer?

(cost for list growth activity + cost for lead gen activity + cost for sales activity per buyer)

8. What is the average sale amount for a first-time buyer?

9. What percentage of your customers are repeat buyers?

10. Are there other specific numbers you need to track to ensure the health of your business (and yourself)?

Now that you know where to focus your efforts, track those metrics!

Remember, it's less about the specific NUMBER and more about the trend. Are you seeing an increase or a decrease in these important numbers over time? What needs to happen to improve your metrics? Put together a spreadsheet that lets you track these important numbers monthly, if not weekly, and start watching those trends!

Need additional help?

[Accountability Club](#) is a great place to start. We're here to help you define and achieve success on your own terms - in as little as an hour a day.