

<b>First name</b>
Jeff
<b>Last name</b>
Zuhlsdorf
<b>Title</b>
President
<b>Company</b>
Tin Man Heating & Cooling Inc.
<b>City</b>
Bowling Green
<b>State/Province</b>
Ohio
<b>Phone</b>
419-575-2880
<b>Email</b>
<a href="mailto:jeffrey.zuhlsdorf@tinmanheating.com">jeffrey.zuhlsdorf@tinmanheating.com</a>
<b>Dealer annual revenue</b>
\$3,465.482.00
<b>Distributor name</b>
Lee Supply
<b>Number of employees</b>
14
<b>Distributor account manager</b>
John Carder
<b>Is your distributor territory manager helping you with the business evaluator?</b>
No
<b>Does your company have a one/three/five year plan in writing?</b>
No
<b>Is this a priority?</b>
High
<b>Does your company have a budget?</b>
No
<b>Is this a priority?</b>
High
<b>Do you run daily/weekly/monthly financial reports?</b>
Yes

<b>Is this a priority?</b>
Medium
<b>How well is this executed?</b>
Needs Improvements
<b>Does the company have a departmental profit and loss statement?</b>
No
<b>Is this a priority?</b>
Medium
<b>Do you know your key performance indicators (KPI's) and how they compare to your plan?</b>
No
<b>Is this a priority?</b>
Medium
<b>Do you have a succession plan or exit strategy in place?</b>
No
<b>Is this a priority?</b>
High
<b>Please rank the tasks in order of importance to your company</b>
<ol style="list-style-type: none"> <li>1. Departmental profit and loss statement</li> <li>2. Run daily, weekly, and monthly financial reports</li> <li>3. Compare key performance indicators (KPI's) to your plan</li> <li>4. Company budget</li> <li>5. One, three, and five year plan in writing</li> <li>6. Succession plan or exit strategy</li> </ol>
<b>Comments (Optional)</b>
As you know these are all important, I'm 63 years old and would like to exit in the next 5 years hopefully on my feet not my back. So an exit strategy to make my company so it is more attractive to buyers. My goal is to have it ready for sale in 3 years stay on for 18-24 months and walkaway.
<b>Do you have a marketing plan?</b>
No
<b>Is this a priority?</b>
High
<b>Do you have a branding strategy?</b>
Yes
<b>Is this a priority?</b>
Medium
<b>How well is this executed?</b>
Needs Improvements

**Do you know Your Market Potential?**

No

**Is this a priority?**

High

**Do you set marketing goals and track costs per lead?**

No

**Is this a priority?**

High

**Do you have an optimized website and a system to grow your online reviews?**

Yes

**Is this a priority?**

High

**How well is this executed?**

Needs Improvements

**Do you utilize social media (Facebook/Instagram/Twitter/Yelp/Blogs)?**

Yes

**Is this a priority?**

Medium

**How well is this executed?**

Needs Improvements

**Please rank the tasks in order of importance to your company**

1. Set marketing goals and track costs per lead
2. Know market potential
3. Optimized website and system to grow online reviews
4. Marketing plan
5. Utilize social media (Facebook/Instagram/Twitter/Yelp/Blogs)
6. Branding strategy

**Comments (Optional)**

We have 774 reviews with a 4.8 rating and I know that is important, people buy from that reputation alone. I would like to have more. We have more than anyone in our area, even the larger dealers in the Toledo market. our lead is only 30 or so which I think that is to close.

**Do you have a documented sales process with dedicated sales team, comfort advisors or selling technicians?**

No

**Is this a priority?**

High

<b>Do you have a tiered pricing system (Best, better, good)?</b>
Yes
<b>Is this a priority?</b>
High
<b>How well is this executed?</b>
Needs Improvements
<b>Do you use a finance program and include buydown costs in pricing?</b>
Yes
<b>Is this a priority?</b>
High
<b>How well is this executed?</b>
Needs Improvements
<b>Do you regularly train on lead generation &amp; selling?</b>
Yes
<b>Is this a priority?</b>
High
<b>How well is this executed?</b>
Poorly Executed
<b>Do you have a pre-call and post-call process?</b>
No
<b>Is this a priority?</b>
High
<b>Do you have a referral and review program?</b>
No
<b>Is this a priority?</b>
Medium
<b>Please rank the tasks in order of importance to your company</b>
<ol style="list-style-type: none"> <li>1. Documented sales process with dedicated sales team, comfort advisors or selling technicians</li> <li>2. Regularly train on lead generation &amp; selling</li> <li>3. Pre-call and post-call process</li> <li>4. Tiered pricing system (best, better, good)</li> <li>5. Finance program that includes buydown costs in pricing</li> <li>6. Referral and review program</li> </ol>
<b>Comments (Optional)</b>

We are part of Praxis S-10 and they went to a electronic version for sales and we have not had much success with it. Mostly that Sales people don't like processes at least the one I tend to hire.

**Have you priced your service labor rate for profitability?**

Yes

**Is this a priority?**

High

**How well is this executed?**

Poorly Executed

**Do you utilize a flat rate pricing system?**

Yes

**Is this a priority?**

High

**How well is this executed?**

Poorly Executed

**Do you have business & training plan, operational procedures for your service & installation teams?**

No

**Is this a priority?**

High

**Do you track individual performance measurements for service and installation teams?**

No

**Is this a priority?**

Medium

**Do you have a structured residential maintenance agreement program in place?**

No

**Is this a priority?**

High

**Do you have a purchase and inventory control / replenishment system?**

No

**Is this a priority?**

High

**Please rank the tasks in order of importance to your company**

1. Purchase and inventory control / replenishment system
2. Structured residential maintenance agreement program
3. Business & training plan, operational procedures for service & installation teams
4. Track individual performance measurements for service and installation teams
5. Utilize a flat rate pricing system

6. Price service labor rate for profitability

**Comments (Optional)**

Inventory has always bothered me I compare our warehouse to a grocery store with no check out and everything is FREE! Plus someone always takes the last one and don't tell anyone or order some in so I'm paying people to shop!

**Do you have a hiring process?**

No

**Is this a priority?**

High

**Do you have a detailed call taking process?**

Yes

**Is this a priority?**

High

**How well is this executed?**

Poorly Executed

**Do you perform detailed performance reviews?**

No

**Is this a priority?**

Medium

**Does the company pay for performance based on the goals of the employee/company?**

Yes

**Is this a priority?**

High

**How well is this executed?**

Poorly Executed

**Do you have a policy & safety manuals and hold regularly scheduled safety meetings?**

No

**Is this a priority?**

High

**Do you have a non-compete / non-Solicitation policy in place?**

No

**Is this a priority?**

Medium

**Please rank the tasks in order of importance to your company**

1. Detailed call taking process
2. Pay for performance based on the goals of the employee/company
3. Hiring process
4. Perform detailed performance reviews
5. Policy & safety manuals and hold regularly scheduled safety meetings
6. Non-compete / non-solicitation policy

**Comments (Optional)**

I have call takers that just fill slots and I have had them trained and talked to them and they just wear me out. They just don't get it, and one is my Daughter!

**Please rank the overall sections in order of importance to your company**

1. Sales
2. Marketing
3. Operations
4. Administrative
5. Planning & Budgeting