



## Contractor Self-Assessment

**Date:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Company:** \_\_\_\_\_

**City:** \_\_\_\_\_

Please rate your company on each question using the scale below. At the end of each section, add up the total amount of points and write it on the line for that section. Once all sections are completed, add up all sections to find the total score for your company.

- 3 – This is something our company does all the time
- 2 – This is something our company does most of the time
- 1 – This is something our company does some of the time
- 0 – This is something our company never does
- N/A – Does not pertain to our type of business

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### Business

- \_\_\_\_\_ Do you start your year with an annual sales and expense budget?
- \_\_\_\_\_ Do you break down the annual sales and expense budget by month?
- \_\_\_\_\_ Do you break down the sales budgets by category (installations, maintenance, pavers, landscaping, etc.)?
- \_\_\_\_\_ Do you have an annual business planning session with your key teammates to lay out the changes to make in your business for the coming season?
- \_\_\_\_\_ Do you set business goals for the year?
- \_\_\_\_\_ Do you track how you are trending to those goals at least monthly?
- \_\_\_\_\_ Do you have a business coach or mentor that you consult with on a regular basis?
- \_\_\_\_\_ Do you have a weekly meeting with your team to go over what is going on in the business, a project recap from the past week and a look ahead to the projects to be installed in the coming week?
- \_\_\_\_\_ Do you have a daily goal for the amount of work to be done in a day to stay on track to your budget?
- \_\_\_\_\_ **TOTAL FOR BUSINESS SECTION (27 Maximum)**



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## Leads/Consultations

- \_\_\_\_\_ Do you have a documented customer referral program to utilize past customers to help drive more business to you?
- \_\_\_\_\_ Do you have a relationships with the majority of your customers where you can just show up at their house to check on or show the project to a prospective client?
- \_\_\_\_\_ Do you give every client their bid personally (not e-mailed to them)?
- \_\_\_\_\_ Do you give the client the bid at the first sales call?
- \_\_\_\_\_ Do you provide your prospective customers with a clean, clear, professional quote for their projects?
- \_\_\_\_\_ Does your quote sheet list out all products that you will be using in the installation?
- \_\_\_\_\_ Do you have a documented lead qualification process?
- \_\_\_\_\_ Do you give personal tours of your past projects, when needed, to prospective clients?
- \_\_\_\_\_ Do you have a sales portfolio that you bring to consultations to show your work?
- \_\_\_\_\_ Do you charge a consultation fee?
- \_\_\_\_\_ Do you prequalify your leads to ensure that you are only pursuing leads that make sense for your company?
- \_\_\_\_\_ Do you return phone calls from potential customers within 24 hours?
- \_\_\_\_\_ Are you on time and look professional for your consultations? (Do you change out of your muddy clothes?)
- \_\_\_\_\_ If you are going to be late, do you call the customer and let them know?
- \_\_\_\_\_ Do your family and friends work as “sales people” for you (meaning, they are always looking for projects for you)?
- \_\_\_\_\_ Do you have the utilities located on a project before you get there for a consultation?
- \_\_\_\_\_ Do you track where every lead has come from?
- \_\_\_\_\_ Do you offer financing on your projects so your customers have a payment option?
- \_\_\_\_\_ Do you use financing to potentially increase the total amount of the sale of a project?
- \_\_\_\_\_ **TOTAL FOR LEADS/CONSULTATION SECTION (57 Maximum)**



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## Projects

- Do you start every project with a plan of the the estimated hours you have budgeted to complete it?
- Do you do job costing on all of your projects to make sure you hit the profit goal you were expecting on the project?
- If you exceed your budgeted hours, do you do a “post-mortem” on the project to see the reasons you exceeded your hours?
- Do you have a commission program for your staff when they upsell work when they are on a project?
- Do you leave your installation customers with something to remember your company by such as a “baby book,” gift basket, etc.?
- Do you send out a follow-up survey to customers after their project installation?
- Do you give your customers a gift if they send back their survey?
- Do you canvas the neighborhood around your projects before you start construction and leave them something like “Pardon Our Dust” cards?
- Do you have a form or system that you use to track hours on a project?
- Do you collect progress payments on large projects?
- Do you have a documented warranty for your projects that is given to the customer?
- Do you have a change order that is signed off on by the customer so there are no hidden surprises for the customer at the end of the project?
- Do you collect payment for the project before you leave the job site at the end?
- TOTAL FOR PROJECTS SECTION (39 Maximum)**

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## Industry Association & Events

- Are you actively involved in your local trade association?
- Do you attend industry trade shows in your area?
- TOTAL FOR INDUSTRY ASSOCIATION & EVENTS SECTION (6 Maximum)**



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## Vehicle

- \_\_\_\_\_ Are your company vehicles professional looking?
- \_\_\_\_\_ Do all of your company vehicles have your company information on it?
- \_\_\_\_\_ Is the company information on your vehicles easy to read?
- \_\_\_\_\_ Does your vehicle have your website on it?
- \_\_\_\_\_ Do you wash your vehicles at least once a week?
- \_\_\_\_\_ Do you have a documented maintenance plan for all of your company vehicles?
  
- \_\_\_\_\_ **TOTAL FOR VEHICLE SECTION (18 Maximum)**

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## Staff

- \_\_\_\_\_ Do you have a bonus/incentive program for your team for hitting goals?
- \_\_\_\_\_ Do you have a documented training program for your staff?
- \_\_\_\_\_ Does your entire staff follow the published dress code your company has established?
- \_\_\_\_\_ Does your staff wear uniforms?
- \_\_\_\_\_ Do you supply your staff with clothing (shirts, sweatshirts, jackets, hats, etc.)?
- \_\_\_\_\_ Do you have a boot allowance to make sure the staff is wearing proper footwear?
- \_\_\_\_\_ Is your staff professional and presentable when on the jobsite?
  
- \_\_\_\_\_ **TOTAL FOR STAFF SECTION (21 Maximum)**

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## Partnerships

- \_\_\_\_\_ Do you have partnerships with local retailers to help each other out and refer leads?
- \_\_\_\_\_ Do you have partnerships with other contractors that perform services that you do not, such as pavers or fences?
- \_\_\_\_\_ Do you have relationships with at least six of your industry peers that you can share ideas with?
- \_\_\_\_\_ Do you belong to local landscape and gardening clubs?
  
- \_\_\_\_\_ **TOTAL FOR PARTNERSHIPS SECTION (12 Maximum)**



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## General Marketing

- \_\_\_\_\_ Do you build a marketing plan and budget to start the year?
- \_\_\_\_\_ Do you have (or have you claimed ownership of) a Google Business listing for your company?
- \_\_\_\_\_ Do you put out press releases (or post on social media) for events, charitable things you have done, or other noteworthy items?
- \_\_\_\_\_ Do you put door hangers on homes in the area when you install a project?
- \_\_\_\_\_ Do you put up a yard sign in the yards of projects you are installing or have installed?
- \_\_\_\_\_ Do you aggressively market to your past customers?
- \_\_\_\_\_ Do you call your past customers multiple times a year to follow up?
- \_\_\_\_\_ Do you market your services to local garden clubs?
- \_\_\_\_\_ Do you belong to your local Chamber of Commerce?
- \_\_\_\_\_ Do you actively participate in your Chamber of Commerce?
- \_\_\_\_\_ Do you track your marketing efforts?
- \_\_\_\_\_ Do you hand business cards out to everyone you talk to?
  
- \_\_\_\_\_ **TOTAL FOR GENERAL MARKETING SECTION (36 Maximum)**

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## Social Media

- \_\_\_\_\_ Do you have an Instagram profile for your business where you share photos/videos of your work?
- \_\_\_\_\_ Do you have a Twitter profile where you actively promote your business?
- \_\_\_\_\_ Do you have a Facebook business page and actively use it to promote your business?
- \_\_\_\_\_ Do you actively post content for your business on Pinterest?
- \_\_\_\_\_ Do you actively use LinkedIn to generate leads for your business?
- \_\_\_\_\_ Do you make your own YouTube videos?
- \_\_\_\_\_ Do you post videos on your business pages and website?
  
- \_\_\_\_\_ **TOTAL FOR SOCIAL MEDIA SECTION (21 Maximum)**



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### eNewsletter

\_\_\_\_\_ Do you send out a regular electronic newsletter?

\_\_\_\_\_ Do you make sure the newsletter comes out on a regular schedule/timely basis?

\_\_\_\_\_ **TOTAL FOR E-NEWSLETTER SECTION (6 Maximum)**

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### Website

\_\_\_\_\_ Do you have an SEO optimized and mobile-friendly website?

\_\_\_\_\_ Do you update your website at least monthly?

\_\_\_\_\_ Do you have a project showcase on your website?

\_\_\_\_\_ Do you have a blog on your website?

\_\_\_\_\_ Do you have AquaScape videos embedded in your website?

\_\_\_\_\_ **TOTAL FOR WEBSITE SECTION (15 Maximum)**

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### Section Totals

\_\_\_\_\_ Business (27)

\_\_\_\_\_ Leads/Consultations (57)

\_\_\_\_\_ Projects (39)

\_\_\_\_\_ Industry Association & Events (6)

\_\_\_\_\_ Vehicles (18 )

\_\_\_\_\_ Staff (21)

\_\_\_\_\_ Partnerships (12)

\_\_\_\_\_ General Marketing (36)

\_\_\_\_\_ Social Media (21)

\_\_\_\_\_ E-Newsletter (6)

\_\_\_\_\_ Website (15)

\_\_\_\_\_ **Overall Total (258)**