

D.Y.A. OVERVIEW/OBSERVATION PROCESS

- 1. Confidentiality Agreement**
- 2. Telephone Conference with Principal(s)**
 - **Structure of business**
 - **Operating data**
 - **Performance vs. forecast**
 - **Critical issues**
 - **Personnel issues**
 - **Long and short range goals**
 - **Profiles of key employees (cost of profiles additional)**
- 3. Client completes - data information request provided by D.Y.A.**
 - **Copies of advertising, retail sales contracts, contracts with key personnel and others**
 - **Includes operating statement (interim and most recent YTD), business and marketing plan, company history and evaluation of key employees**
- 4. Set time/date for overview (observation)**
- 5. On site observation (2 days at clients place of business)**
 - **Arrive night before - (meeting with principals)**
 - **Examine all operating departments of business**
 - **Meeting with core groups (rescript where possible)**
 - **Respond (Q & A)**
 - **Clients encouraged to record data and effect some changes ASAP**
 - **Reevaluate business plan, marketing plan, forms, controls, policies (make recommendations on site)**
 - **Debriefing session at end of day 1**

- Continue observation day 2
 - Overview of current sales methodology
 - Evaluate
 - Meeting with salespeople (time permitting)
 - Recommend changes
 - Overview of marketing department, telephone sales reps, and sales assistants
 - Evaluate
 - Recommend changes
 - 2nd day (final) debriefing
6. Review with management (professional advisors - time permitting)
- Operating statement and balance sheet
 - Pricing schedules
 - Accounting procedures
 - Bookkeeping, accounting methods
 - Suggestions RE: options and new methodology
 - Contract(s) and other operating procedures
 - Budget and forecast
7. Additional written follow up
8. Follow up (by phone) in 30 days

For Additional Information - - Call, Write, Fax or Email TODAY!

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