**Onboarding Questionnaire Results**

# Business Name (official and trading as/DBA)

Tracylinn LLC

# Name

Tracy Eisenman

# Phone

7242630304

# Email

# Business Mailing Address

68 Skylark Dr

Washington, PA 15301

United States

[Map It](https://maps.google.com/maps?q=68+Skylark+Dr+Washington%2C+PA+15301+United+States)

# Marketing Coordinator Name

Tracy Eisenman

# Marketing Coordinator Email Address

# Your Business ' Website Address

<https://www.Tracylinn.com>

# LinkedIn Profile Link

<https://www.linkedin.com/in/tracyeisenman/>

# Facebook Page Link

<https://www.facebook.com/groups/964965578133775>

# Instagram Link

# Other Links

https://heal.me/practitioner/tracy-eisenman-holistic-wellness-practitioner

Youtube I have but have not put it together well yet.

# Please ensure I have shared access to:

\* Google Analytics

\* Google Search Console

\* Sales/Marketing CRM

\* Ads Managers

General

# How many products and/or services do you sell?

3-4

# Do you have a specific way of suggesting more services or products to your customers to buy or use?

No

# Why do you do what you do?

1\. Motivated to help people understand how to optimize their health naturally on their own. Core Values- Reliability- Honesty- Resilience- Goals- to build this so that it can be franchised out and get the word to more people. Biggest needs- a method to reach more clients. Influences beliefs- watching people waste their time being unhealthy and not enjoying life to its fullest. Habits- I live the life that I share in my program- awareness- choice-action- change. Strengths- coaching with care and creating using science and DNA research to fortify my clients needs. Weaknesses- working alone and expecting to hold down the fort and grow. Proud of- The way my clients and me have made healthy changes and continue to do so. Improving- Creating a multilevel offer high end and low end where it works like clockwork and still gets my personal touch. Hopes- this year- get 6 - 6 month cohorts full, a retreat in April, fully organized on the back end with a DIY offer in place, with 5 sponsors- in 3 years look at franchises

# How do you explain what you do when you meet strangers?

I help people get their sexy back.

# How do you explain what you do when talking with a potential customer or client?

I offer a 6 stage process that disrupts your lifestyle and offers optimal health naturally . Using your own DNA we can create a personalized lifestyle program that will create vitality for the rest of your life.

# Tell me about how your business works.

I sell programs or coaching sessions

# How many of your sales are new versus repeat?

I had 80% of my first beta program continue as alumni (monthly membership) I am in a building phase.

# What is each customer worth to your business in dollars ($)?

We can work on this- Monthly subscription $97 Program cost Beta 1500- New cost 4000-5000 (3 month -6 month)

# What kind of marketing strategies have worked for you in the past?

So far I have made telephone calls to onboard my warm market and networking events on zoom through alignable.

# What are the things you know you have to do?

I need to do weekly lives on social media. Create a plan for reachouts on social media. Speak in pubic and get on stages that reach a bigger audience. Get my system more automated. Use mailchimp more. Create a weekly plan of action for all of the above.

# How many hours per week do you work on average?

45+ in all 4 businesses

# How many hours do you spend on sales in your business?

3

# How many hours do you spend on marketing in your business?

3

# How many hours do you spend on product delivery in your business?

10

# How many hours do you spend on team management and HR in your business?

0

# How many hours do you spend on administration in your business?

10

<https://heal.me/practitioner/tracy-eisenman-holistic-wellness-practitioner>

# Do you fully own your business?

Yes

# Do you own any trademarks for this business?

No

# Is another company in charge of your intellectual property (IP)?

No

# Are you planning to sell this business in the future?

Yes

# Are you planning on buying any other businesses?

No

# When are you planning on selling your business?

When I decide to retire- before I die. It may be another 50 years..

# How is your team currently set up?

It's just me.

# Are you happy with how your team is currently set up?

Not applicable

# List the roles in your company.

I have used a team for awhile to get my instagram page set up. I may go back to them in the future. Just watching expenses for now. We plan to meet in 2024.

# Are you using SOPs (standard operating procedures)?

No

# Do you have a marketing team with a person dedicated to the implementation of marketing?

Yes

# How often do you meet with your team?

We will meet again in 2024

# Marketing CRM

MailChimp

# Website Platform

GoDaddy

# Other Tools

\* Loom

\* Calendly

\* Grammarly

\* ChatGPT

# Any other business tools that you use, that are not listed here?

Mailchimp-

GoDaddy Website

# Provide a general description of your current clients.

I have 1 man and 6 women- Middle aged, mostly 30 lbs overweight or more, with a desire to be more healthy

# Briefly describe an ideal client you already have, that you would like to have more of.

A 50 year old successful woman who will dive in and do what it takes to get results. They have a strong why!

# Who are your competitors? List your top 3, with links to their websites:

Weight watchers-https://www.weightwatchers.com/

Noom-https://www.noom.com/

Beyond body-https://woman.beyondbody.me/

# Do you have a specific niche or specialization you market directly to?

Yes

# Do you check the rates and offers of your competitors?

Yes

# Tell us more! Who are your targeted markets?

Middle aged men and women who are ready to take action for their health

# How are you communicating with your targeted markets?

Not much at all

# Why do your customers choose to purchase from you instead of your competitors?

I am a small boutique experience, hands on, that uses DNA to determine what you need

# What do your current customers most love about your business?

It is a very personalized experience.

# What do your current customers most love about your product/service?

It is unique and they get a lot of support.

# What do your current customers complain about regarding your products or services?

Too much information at one time- I have changed that. I am making adjustments per their responses to questionnaires.

# How do your products/services positively change your customers’ lives?

They can look forward to health instead of sickness in their golden years. Less expensive drugs, less fear of what the doctor will say.

# What are the core values or guiding principles for your business?

Every person has the ability to change their health when they create a healthy lifestyle. This includes mental, physical, emotional and nutritional.

# What are 3 keywords that sum up the value you bring to your clients/ customers?

Confidence, Clarity & Vitality

# Are there any slogans or taglines you use?

Not yet- I do use the vision of driving a car down the road to vitality and confidence.

# If your brand were a person, what would they be like?

If my brand were a person, they would be a caring, reliable and dynamic coach who motivates each client in a positive way using cutting edge science as a guide on the journey to good health.

# What is your sales revenue?

This year (start up) it was 14K for 5 months

# What is your profit margin?

0\. Start up expenses with DNA Membership 8K. Business coach 5K. Infrastructure 3K

# What guarantees or risk reversals do you offer?

If a client does not reach their goal in 6 months, I will continue to work with them for 3 months at no charge.

# Do you have a special deal or a small, affordable offer to get started with?

Yes

# How do most of your customers purchase from you?

\* Calls

# Do your current customers complain that your prices are too high?

Yes

# Have you ever mapped out your sales process?

Yes

# Do you use a sales pipeline or a system for managing your sales process?

Yes

# Do your customers need to apply, register, or become a member before they are able buy your products?

No

# Do you have templates/scripts for your sales emails/calls?

Yes

# Do you have automatic follow-up emails in your sales process?

No

# Do you have a reactivation program or offer a way to get back in if they have been away for a while?

No

# Do you have a retention program or a way to keep customers coming back?

Yes

# Do you make affiliate sales or earn money through affiliate links?

No

# What is the primary way that your customers find you?

I call them.

# How are you currently collecting email subscribers?

I have a free gift sign up sheet on GoDaddy.

# Do you have a database of your past clients?

Yes

# Do you have a database of potential prospects?

Yes

# Are you using lead magnet freebies?

Yes

# How many people are on your prospects list?

30

# Please share the link to your lead magnet opt-in.

https://websites.godaddy.com/en-US/editor/e09bdb69-27b4-4988-8e9b-d4ae7d40c826/e67aef88-7eca-4937-82d0-f4a77fea175f/preview?source=editor.rollup\_page

# Are you utilizing an email welcome sequence when someone joins your email list?

No

# Do you speak at live in-person events?

Yes

# Do you run webinars?

Yes

# Do you attend any conferences or trade shows?

No

# How often do you send emails to your list?

not enough-

# What social media channels are you active on?

\* Facebook

# Are there any social media channels you’d like to start using?

Youtube- instagram and linkedin

# How often do you post on each social media channel?

weekly

# Is your email list segmented?

Yes

# Do you send text message promotions (SMS)?

No

# Do you have live chat?

No

# Do you have a content strategy?

No

# Do you repurpose content?

No

# Do you have a podcast?

No

# Do you provide guest posts for your industry?

Yes

# Have you worked with any public relations (PR) professionals?

Yes

# Do you sponsor anything or anyone?

No

# Do you run ads on social media?

No

# Do you run ads on Google?

No

# Do you regularly produce blog content?

No

# Do you use cold outreach methods?

No

# Do you use any marketing tactics selling your products or services where you 're selling somewhere not online?

No

# Do you use any offline strategies?

not yet

# Do you know your average conversion rate?

Yes

# Do you have a personal dashboard for checking stats?

No

# Is your Google Analytics account set up and collecting data?

No

# Do you know how many opt-ins you get a month?

No

# Do you know how many leads you get a month?

No

# Do you know how many sales calls you take a month?

Yes

# What is the average number of sales calls you take per month?

2

# Do you track email KPIs?

No

# Do you track social KPIs?

No

# Do you track SEO KPIs?

No

# Do you conduct surveys with your customers?

Yes

# Have you ever interviewed one of your clients?

Yes

# Do you regularly ask for testimonials or reviews?

Yes

# What do you use to survey customers?

jotform

# Do you have any case studies or white papers?

No

# Do you use a "Shock & Awe" strategy?

No

# Do you work with any strategic partners?

No

# How do you generate referrals?

I offer $1000 to any client who brings a qualified referral if they have been in the program and $500 if they are outside the program

# How do you provide an ongoing, high-quality experience for your customers?

Alumni members get 2 DNA reports per month- weekly zoom meetings- recipes- I track their weight loss and inches lost monthly. For one client I message her and have her send me pics of what she eats. She forgets to eat.

# What do you personally value the most about your business?

Customer satisfaction: Providing products or services that meet the needs of customers.

# What factor do you feel is the most important one for your business?

Effective marketing and sales: You need to get the word out about your product or service and convince people to buy it. This requires effective marketing and sales strategies.

# Describe what would your business be like if it was achieving the success you 'd like to see?

Ah yes: This busienss would have full 6 full cohorts- half women half men- 10 people per cohort, with a waiting list in the members catagory. The alumni would continue to play a dymanic role in the weekly group.

It would have 5+ sponsors- fitbit-online exercise- Calm.com- and so on.

The admin. social media and marketig would be automated or run by a team.

We would have 2 retreats per year, and franchised out to people who would put

the love and care into it that it deserves.

People would get healthy and live their best lives and their families would

continue the trend for themselves.

# What does success look like for you, a year from now?

In a year this company would have 30+ members- 4 full cohorts- 2 sponsors- low end DYI running smoothly with a monthly stream of 10 new people all coming to the weekly zoom and sharing their stories. We would have a waiting list to get into the cohorts.

I would be speaking in person and attending conventions a couple times a year.

Financial success would be 6+ figures and I would be started on my own book.