

# Merchant Revenue Worksheet

DBA: \_\_\_\_\_ Date: \_\_\_\_\_

IMC: \_\_\_\_\_ RSM: \_\_\_\_\_

First Five Minutes

1. Why/When did Merchant start their Business? \_\_\_\_\_

2. What are TOP 2 Revenue Building Priorities for next 12 months?

1.) \_\_\_\_\_

2.) \_\_\_\_\_

3. Check each Set Up Point you explained:

- ☐ avg impact of \$500-\$700/mo  
☐ Not about Rates BUT Revenues  
☐ A+ Rating w/ BBB

- ☐ Free EMV Equipment  
☐ Monthly Agreement  
☐ NO Termination Fee  
☐ Next Day Funding

4. Did you tell the merchant about the \$59 Application fee? \_\_\_\_\_

5. To eliminate pressure, ask the owner for the FAVOR to say NO if we can't, YES if we can help with their TOP 2 Revenue BUILDING Priorities.

Did they agree to say NO? \_\_\_\_\_ Did they agree to say YES? \_\_\_\_\_

Service Segments

## Services Offered:

- ☐ EMV Terminal Placement (avg \$40/mo)  
☐ Apple Pay / Google Wallet  
☐ Debit/Credit 1.29% (Amex@2.25%)  
☐ NDF ☐ M2M Service ☐ Monthly Billing

What is their avg sale/ticket = \$ \_\_\_\_\_

## AMP Marketing Services:

- ☐ Groovv Offers(2 to 5 New Cust/week)  
☐ PASSMARKET  
     1 - E-Coupons  
     2 - Social Media Advertising  
     3 - Online Ordering  
☐ Receipt Coupons  
☐ ON Deck

## Income

\$ 40

\$ 40

\$

\$

\$

\$

\$

## Expense

Free!

Free!

Free!

Free!

Free!

## 1.)First Full Month Comparison:

Does Merchant prefer GREEN or PAPER Statements?

GREEN ☐ PAPER ☐

\$

vs \$

## 2.)Revenue Snowball: (What % of New Cust Owner say will return?) \_\_\_\_\_%

Month 1=\$\_\_\_\_\_,2=\$\_\_\_\_\_,3=\$\_\_\_\_\_,4=\$\_\_\_\_\_,5=\$\_\_\_\_\_,6=\$\_\_\_\_\_

Is Merchant Incorporated or a Sole Prop? ☐ INC ☐ SOLE PROP

3.)Additional Questions/Concerns? \_\_\_\_\_

If we can answer all questions completely can we go ahead and provide their services? YES ☐ NO ☐