

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)
☐ Merchant Cards (3 Uses)
 1 - Traditional Gift Cards (1-2 week)
 2 - Refund Card (1-2 Month)
 3 - \$5 Giveaways (10-15 Month)

- ☐ Does Check Service Apply here?
☐ ON Deck

Income

\$ 40

\$ 40

\$

\$

\$

\$

Expense

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 ☐