

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:

<input type="checkbox"/> avg impact of \$500-\$700/mo	<input type="checkbox"/> Free EMV Equipment
<input type="checkbox"/> Not about Rates BUT Revenues	<input type="checkbox"/> Monthly Agreement
<input type="checkbox"/> A+ Rating w/ BBB	<input type="checkbox"/> NO Termination Fee
	<input type="checkbox"/> 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 Segment

Services Offered:

Income

Expense

What is their avg sale/ticket _____

AMP Marketing Services:

☐ Groovv Offers(2 to 5 New Cust/week)

\$ _____

\$29.95

☐ Merchant Cards (3 Uses)

1 - Traditional Gift Cards (1-2 week)

\$ _____

2 - Refund Card (1-2 Month)

\$ _____

3 - \$5 Giveaways (10-15 Month)

\$ _____

\$19.95

☐ EMV Terminal Placement (avg \$40/mo)

\$ 40.00

Free!

☐ Apple Pay / Google Wallet

Free!

☐ Debit/Credit 1.29% (Amex@2.25%)

\$ 40.00

Free!

☐ NDF ☐ M2M Service ☐ Monthly Billing

☐ Does Check Service Apply here?

☐ ON Deck

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 ☐