



PERFORMANCE EVALUATION TOOL

MID-YEAR BUSINESS HEALTH CHECK

What successful window treatment owners evaluate in July—and act on before Q4.

This is not a feel-good exercise. Work through each section honestly. The gaps you identify here are your Q3 action plan.

01 REVENUE YTD VS. GOAL

- Have I brought in at least 50% of my annual target — and if not, what specifically must change in Q3?
- Am I ahead or behind last year's pace, and do I understand why?

02 GROSS MARGIN HEALTH

- Are material and labor costs tracking within 2–3% of the projected margin?
- Have I adjusted pricing in the last six months — or am I absorbing cost increases silently?

03 PROFITABILITY

- Is net profit YTD funding owner income, cash reserves, and reinvestment — or just covering overhead?
- Could the business survive a 60-day slow period right now?

04 LEAD FLOW

- How many qualified leads came in each month — and is that number trending up, flat, or declining?
- Do I know which two or three sources produce my best clients — and am I deliberately investing there?

05 CLOSE RATE

- What percentage of proposals converted — and how does that compare to my target?
- Do I have a documented follow-up system, or is follow-through dependent on memory and mood?

06 AVERAGE TICKET SIZE

- Is my average sale growing, flat, or eroding — and do I know why?
- Do I have a consistent process for presenting motorization, layering, and higher-margin options on every appropriate job?

07 LABOR & SCHEDULING CAPACITY

- Are installs completing on time and within budget — and if not, is the constraint labor, process, or both?
- Am I carrying the right team capacity into Q4, or will I be scrambling to staff a busy season?

08 MARKETING ACTIVITY

- Is marketing generating measurable lead activity — or am I just staying visible?
- Do I have a specific, compelling offer planned for Q3 — or am I hoping business shows up?

09 OWNER'S TIME

- What percentage of my week is spent on CEO-level work — strategy, growth, leadership — vs. reactive tasks?
- What is the one highest-leverage thing I am not doing because I haven't freed up time to do it?

10 CLIENT EXPERIENCE & RETENTION

- Do I have a documented post-install process that consistently generates reviews, referrals, and repeat business?
- When did I last do a true audit of the client experience from inquiry to final walkthrough — and what does the feedback say?