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FREE BUSINESS TRANSFORMATION CHECKLIST

1. INTRODUCTION

The purpose of this document is to provide a FREE high level **Business Transformation checklist**, ready for you to apply to your business today, getting first hand experience of the value TMG creates for its clients.

2. BUSINESS TRANSFORMATION CHECKLIST

Every business is different, however, many activities that determine the success of your business can be replicated and structured with our easy to follow process manual. We have created three key areas for you:

- Marketing
- Finance
- Technology & Operations

3. MARKETING

- **Determine Customer Segments:** Why? So you can speak to your customers in a way they understand and relate to.
Review the current customers of your business and allocate profile segmentation, grouping customers in different buckets e.g individuals vs small businesses, large enterprises. This allows you to create a tailored communication plan relevant to these specific customer groups.

- **Brand revamp:** Why? Capture the attention of new and existing customers.
When was the last time that you refreshed your brand? A light rebranding of the business can do wonders. A refreshed logo, new colours, and a social content plan can capture the attention and better resonate with your customers. Once the company ramps up its sales thanks to these activities, a more in depth rebranding campaign could take place as phase 2.
- **Website creation:** create (or relaunch) a website that your users can easily find and book your services online.
The website should also be optimized for SEO (search engine optimization) keywords that will allow users to find services online and stand out over your competitors.
- **Social Media Content:** Create a social media content plan that will ensure that new relevant content is posted every week through various channels like Instagram, Facebook, LinkedIn, TikTok, Yelp etc. This is another way customers can find your business online.
- **Referral Program:** create a referral program via your website and email sends so that existing customers are able to refer new customers to your business for a small discount on the next service, another great way to attract new customers and leverage powerful word of mouth.
- **Email Newsletter:** A weekly or bi-monthly email newsletter to keep the audience engaged on the latest trends relevant to your business segment, a way to collect email addresses and keep your business top of mind with customers.
- **Paid Ads:** Set some budget aside and run paid ads to exponentially increase your ability to reach your target customers. You would be amazed at how many people will have visibility on your business and will get to know you.

4. FINANCE

- How well do you know your numbers? Create a 3 year historical Profit & Loss (P&L) to analyse the revenue, cost of goods sold and operating expenses like rent, wages, vehicles and marketing expenses. The image on the side is an example of a 3 year P&L.
- Why? This will provide a clear picture of the profitability of the business and help you prioritize which activities to tackle first in order to grow your business and make it more efficient.
- Review the current company incorporation structure and enhance its yearly tax liability

	FY2022	FY2023	FY2024
P&L (Ex Tax)	ACTUAL	ACTUAL	ACTUAL
Revenue	€0	€0	€0
COGS (Line 1)	€0	€0	€0
COGS (Line 2)	€0	€0	€0
Gross Margin	€0	€0	€0
Gross Margin %			
TEAM	€0	€0	€0
OPERATIONS	€0	€0	€0
MARKETING	€0	€0	€0
OTHER COSTS	€0	€0	€0
TOTAL COSTS	€0	€0	€0
EBITDA	€0	€0	€0
% EBITDA	0.00%	0.00%	0.00%

threshold to the bare minimum in order to maximise new profit after tax.

5. OPERATIONS & TECH

Ensuring that your business has streamlined processes and technology automations through softwares is key in this day and age.

- **Automations:** Software can run processes for you automatically, allowing for less manual intervention by people, they can focus on more value added tasks, and an opportunity to cut costs.
- **Customer experience:** Thinking about how you can improve the outcome of each of your processes and interactions for your customers, guaranteeing a better customer experience for them and a higher chance of repeat business.
- **Invoicing:** a perfect place to look at automated solutions, a revamp linked to payments, bank account and financials.
- **Job Scheduling:** Implement software for scheduling jobs and routes to best optimize your labour costs, balanced with quality customer experience.
- **Sales CRM:** launch a CRM for sales process management like [Monday.com CRM](#) to easily manage inbound leads coming in from the website or social media, and quantify revenue.
- **Revamp Services:** review the full list of services and its pricing, identifying gaps or opportunities to increase revenue and gross margins.
- **Subscription Services:** come up with a yearly subscription for VIP customers that book jobs regularly to increase their spending based on key offers.

6. THE MAKEOVER GROUP

[The Makeover Group](#) (TMG) is a company that was born to help small businesses to **unlock their potential** and grow in the marketplace.

We're a unique group made up of thinkers, doers, creators, leaders, innovators, hard workers, and storytellers. We roll up our sleeves and dive into supporting your small business with a customized approach so you can focus on future-proofing your legacy within the community.

Below are some links about TMG:

- [Website](#)
- [Team](#)
- [Facebook](#)
- [LinkedIn](#)
- [Instagram](#)

Contact us via email to for a deep dive into your business at hello@yourtmg.com or simply book a video call through the link: <https://calendly.com/alessandro-yourtmg/30min>

www.themakeovergroupco.com