

Business Name *

Your Name*

Partners Name(s), if any*

% Ownership*

You _____% Partner 1 _____% Partner 2 _____% Others _____%

Address *

City/St/Zip*

Phone Number(s) to all partners over 20% *

Preferred Time To Call You *

Morning Afternoon Evening

Email *

Website/URL *

CPA Name?

Business Atty Name?

IT Person Name?

Processing/POS Company or Person Name?

Key Employees Name(s)?

Other People that are crucial to your business?

About You...

What made you decide to become an entrepreneur?

Did you start, inherit or purchase this business?

Started Inherited Purchased

Are you satisfied with your experience as a small business owner?

Yes No

If you're not satisfied - why?

Do you have a good balance between your business, work, personal life, health & fun?

Almost Always Frequently Infrequently Seldom or Never

Do you have a clear idea of the kind of life you want to experience daily?

Almost Always Frequently Infrequently Seldom or Never

Do you have a clear picture of what your vision and values are?

Almost Always Frequently Infrequently Seldom or Never

Do you work more hours than anyone else in the business?

Almost Always Frequently Infrequently Seldom or Never

Do you use a time management system?

Almost Always Frequently Infrequently Seldom or Never

About Your Vision...

In a perfect world, your business would generate:

- Sales of \$_____
- Gross Profits of \$_____
- Net Profits of \$_____
- Spend Your Days Doing: _____
- Reward Yourself With: _____

Your vision for your business is to: *

Sell It Franchise It Replicate It Use It As An Income Source Other (explain)

List 3 key issues or challenges that are blocking you from achieving your vision: *

- 1.
- 2.
- 3.

When would you like to have your vision complete? *

- 1.
- 2.
- 3.

What else should know about your vision that would help us fine tune a course of action? *

- 1.
- 2.
- 3.

About Your Customer...

Describe your typical customer:

- 1.
- 2.
- 3.

Where are your customers located?

Local Regional National International

Do your customers clearly understand what specific points distinguish you from the competition?

Almost Always Frequently Infrequently Seldom or Never

Are your current marketing activities effective?

Yes No Somewhat

How to improve? _____

Have all potential customers been identified?

Yes No Somewhat

What is missing? _____

What other concerns do you have about customer acquisition and relationships?

- 1.
- 2.
- 3.

About Your Business...

How would you describe your cash flow?

Excellent Good Fair Poor Inconsistent Other

Do you pay your bills on time?

Always Most Of The Time Not Very Often Almost Never

If no, why not? _____

Do you have concerns about debt level within the company?

Yes No Other What are your concerns? _____

What payment terms do you require of your customers?

Due On Receipt 15 Days 30 Days 45 Days 60 Days

How old are your accounts receivable collections?

Current 30 Days 60 Days 90 Days Don't Know Don't Have Any

If delinquent, why? _____

What kinds of financial reports do you generate on a regular basis? Check all that apply: *

Profit & Loss? Y N **Balance Sheet?** Y N **Cash Flow?** Y N **Budget?** Y N

Projections? Y N **None?** Y N

Other? Explain? _____

How often do you generate the reports checked above?

Weekly Monthly Quarterly Annually Other

How much of the information obtained from your financial reports do you understand and use?

All Of It 75% 50% 25% None

Are your budgets regularly monitored for future planning and cash flow?

Always Most Of The Time Not Very Often Almost Never

Do you have a close working relationship with your bank and/or investors?

Always Most Of The Time Not Very Often Almost Never

Do your inventory control systems achieve maximum turns and ROI?

Always Most Of The Time Not Very Often Almost Never

What other concerns do you have about your business?

About Your People (Employees)...

In addition to you, how many employees are in a management position?

None 1 to 5 6 to 10 10+

How consistent are the results your employees produce?

Very Consistent Somewhat Consistent Inconsistent We Never Know

Do you have a Human Resources manager?

Yes No If yes, name? _____

Do you have a written organizational chart for your business?

Yes No (if yes, see chart)

How clearly defined are the positions on your organizational chart?

Everyone knows exactly what their role is

Most employees know what they are expected to do most of the time

No one seems to know what their role is

How often do you conduct employee performance evaluations?

Every Month Every Quarter Every Year Never

Would there be a serious interruption in the company if any one person left?

Yes No If yes, who and why? _____

Does staff training occur by plan on a regular basis?

Always Most Of The Time Not Very Often Almost Never

Do your managers take the time needed to improve their skills?

Always Most Of The Time Not Very Often Almost Never

Do you have a tested employee company handbook?

Yes No If yes, updated post covid? Y N

What other concerns do you have about your employees?

About Your Marketing...

How do you attract the majority of your clients? (Circle all that apply)

Referral Direct Mail Website Social Media and/or Paid Social Ads

Inside Sales People Outside Sales People Yellow Pages Print Advertising Email Marketing

Paid Advertising (Google Ads, Bing Ads, etc) Radio Ads TV Commercials

Other, describe? _____

What other promotional efforts have you tried?

Referral Direct Mail Website Social Media and/or Paid Social Ads

Inside Sales People Outside Sales People Yellow Pages Print Advertising Email Marketing

Paid Advertising (Google Ads) Radio Ads TV Commercials

How effective were your efforts?

Very Somewhat Not Very Useless

Does your company get all the leads it needs?

Always Most Of The Time Not Very Often Almost Never

Can you easily determine the effectiveness of your lead generation activities?

Always Most Of The Time Not Very Often Almost Never

Do you easily obtain referrals?

Always Most Of The Time Not Very Often Almost Never

Do you actively participate in social networking? If so, which platforms (circle all that apply)?

No Twitter Facebook LinkedIn YouTube Other, describe _____

What other concerns do you have about your marketing?

About Your Sales...

How much do your sales vary from month to month?

Less than 10% 20% 30% 50% More than 50%

If 30% or more, why? _____

What percentage of your sales does your best salesperson produce?

Less than 10% 20% 30% 50% More than 50%

Does your sales team achieve predictable results?

Always Most Of The Time Not Very Often Almost Never

Does your sales team clearly understand what differentiates your company from the competition?

Always Most Of The Time Not Very Often Almost Never

Primary difference between you and competition? _____

Do you consistently produce enough sales?

Always Most Of The Time Not Very Often Almost Never

Do you hold sales training on a consistent basis?

Always Most Of The Time Not Very Often Almost Never

Do you make the extra effort to handle your customers unreasonable demands?

Always Most Of The Time Not Very Often Almost Never

Do you conduct regular sales meetings?

Always Most Of The Time Not Very Often Almost Never

Does your team work well with your operations team?

Always Most Of The Time Not Very Often Almost Never

What other concerns do you have about your sales, sales team or sales plan?

About Your Systems...

Are you quick to identify and adapt to changes in your industry?

Always Most Of The Time Not Very Often Almost Never

Do you educate staff and clients about industry trends?

Always Most Of The Time Not Very Often Almost Never

Are your customers happy with your service/product?

Always Most Of The Time Not Very Often Almost Never

If not, primary complaint? _____

How satisfied are you with the systems you use to achieve results?

Always Most Of The Time Not Very Often Almost Never

Do you have a system for quality control?

Yes No If yes, describe _____

Which best describes your systems for quality control? We conduct scheduled quality checks...

Weekly Monthly Quarterly Annually We wait until a customer complains

How many of your customers become repeat buyers?

All 75% 50% 25% Less than 25%

Do you promise on-time delivery?

Yes No

How often do you deliver on time?

Always Most Of The Time Not Very Often Almost Never

How often do you find yourself putting out fires?

Once a month Once a week Almost none of them

How many of your systems are documented?

Most Some Almost none

Are your managers open to change within your current systems?

Yes No If no, why not _____

What other concerns do you have about your systems?

About Your Technology...

Is your computer system comprised of the most up-to-date hardware and software?

Yes No If no, why haven't you upgraded? _____

Do you perform daily backups?

Yes No

Is your data backed up off-site?

Yes No

Do you use financial bookkeeping software?

Yes No

Which financial bookkeeping software do you use?

QuickBooks FreshBooks Peachtree Other (name) _____

Does your software provide detailed financial reports?

Yes No

Do you have a system that tracks productivity?

Yes No

Do you use a customer relationship management software program?

Yes No

Is your computer hardware adequate?

Yes No

Is your software up-to-date and supported?

Yes No

Is your staff trained to use your computer software?

Yes No Partially

Are you trained to use your computer software?

Yes No Partially

Do you pay for support for your computer and software system (POS) or depend on key employee?

Paid support Key employee I do it myself

What other concerns do you have about your technology?