

# Confidential Business Questionnaire

Name(s)	Referred By
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## Business Information

Business Name	Business Phone
	Fax
Business Address	Mobile
	Email
	Website

When was the business founded?				
How did you get started in the business? When?				
What kind of product or service does your business provide?				
What makes your business different from the competitors?				
Where do you see your business going in the future? <i>(Growth, new product/services, etc.)</i>				
What challenges do you anticipate?				
Form of Ownership <i>(Mark one)</i>	<table border="1"> <tr> <td>Sole proprietorship Partnership C Corporation</td> <td>S Corporation Limited Liability Company Tax-Exempt/Government Organization</td> </tr> </table>	Sole proprietorship Partnership C Corporation	S Corporation Limited Liability Company Tax-Exempt/Government Organization	
Sole proprietorship Partnership C Corporation	S Corporation Limited Liability Company Tax-Exempt/Government Organization			
How many owners are there?	<table border="1"> <tr> <td></td> <td><i>Are any owners related? How?</i></td> <td></td> </tr> </table>		<i>Are any owners related? How?</i>	
	<i>Are any owners related? How?</i>			
How many people are employed at your business?	<p>_____ <i>Management</i> _____ <i>Non-Management (Union)</i> _____ <i>Non-Management (Non-Union)</i></p>			
Could you tell me about your business's management structure?				
Are you involved in any other business? If yes, in what capacity?				
Who do you rely upon for business advice?				

Directions: Mark with a ✓ the following statements which describe a condition which either has existed in your business in the past, exists now, or which you are concerned may exist in the future. If all or more than one are true, please mark a ✓ in each of the appropriate boxes.

	Past	Now	Future	N/A
Example 1. Not enough sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Translation: Sales have been slow in the past, are slow now, and I'm concerned that I don't know what to do increase them in the future.

<b>A. Sales Concerns</b>	Past	Now	Future	N/A
1. I don't have enough sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I don't have a good enough sales team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. We should be selling more	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I don't know how to sell as well as I'd like	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I don't know what sales will be month to month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I don't have time to make enough sales calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Sales have been up and down	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I do most/all of the sales myself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>B. Marketing Concerns</b>	Past	Now	Future	N/A
1. I don't have good marketing materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I don't know how to get more prospective clients/customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I don't know how to advertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I'm not sure if I should advertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. My advertising doesn't work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I'm not sure the advertising I do pays for itself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. People don't recognize the need for my service(s)/product(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>C. Executive Management Concerns</b>	Past	Now	Future	N/A
1. I am disorganized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I can't take a vacation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. My paperwork is always getting lost (I have too much)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I can't find anything in my files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I work too many hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I do most/all the work myself	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I don't have clear goals for my business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I don't have clear personal goals for myself and family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**D. Product Key Concerns**

	<b>Past</b>	<b>Now</b>	<b>Future</b>	<b>N/A</b>
1. I'm never sure a job can be done on time	_____	_____	_____	_____
2. I'm not sure I'm estimating/pricing services profitably	_____	_____	_____	_____
3. I'm the only one who can do estimating/pricing	_____	_____	_____	_____
4. I have trouble estimating how long it takes to do a job	_____	_____	_____	_____
5. My service/production costs are too high	_____	_____	_____	_____
6. I need to increase my productivity	_____	_____	_____	_____
7. My customers complain about my service/deliveries	_____	_____	_____	_____
8. I need new equipment	_____	_____	_____	_____

**E. Finance Key Concerns**

	<b>Past</b>	<b>Now</b>	<b>Future</b>	<b>N/A</b>
1. I don't have enough money	_____	_____	_____	_____
2. I can't pay my bills on time	_____	_____	_____	_____
3. My suppliers will only sell to me on C.O.D.	_____	_____	_____	_____
4. I'm not making a profit	_____	_____	_____	_____
5. My customers don't pay on time	_____	_____	_____	_____
6. I can't afford to hire enough help	_____	_____	_____	_____
7. I never know where I stand financially	_____	_____	_____	_____
8. My overhead is too high	_____	_____	_____	_____
9. I'm not sure what my break-even point is	_____	_____	_____	_____
10. I can't afford any new equipment	_____	_____	_____	_____
11. My cash flow is inconsistent (terrible)	_____	_____	_____	_____
12. I don't like collecting money	_____	_____	_____	_____
13. I don't know how to (or can't) get a loan	_____	_____	_____	_____
14. I can't afford to keep insufficient inventory	_____	_____	_____	_____
15. I'm not sure what records to keep	_____	_____	_____	_____
16. I do most/all of the work myself	_____	_____	_____	_____
17. I'm not able to control current costs and accurately forecast future costs	_____	_____	_____	_____
18. I'm not sure what my sales/service/production costs are	_____	_____	_____	_____

# Systems Solutions

**Directions:** Mark with an ✓ the appropriate box (either Yes or No) identifying the presence or absence of the following systems in your business. Indicate **Yes only if the system is in documented (written) form.**

## A. Sales Systems

*Do you have a system for... ?*

	Yes	No	N/A
1. Replacing yourself with a sales process you can teach to others?	_____	_____	_____
2. Creating a scripted presentation that can be used consistently with all customers / prospects?	_____	_____	_____
3. Using a sales presentation designed to uncover your customers' needs?	_____	_____	_____
4. Understanding how buying decisions are made and developing a sales process based on those principles?	_____	_____	_____
5. Establishing sales goals and tracking the effectiveness of your sales process?	_____	_____	_____
6. Developing responses to your customers' most often asked questions?	_____	_____	_____
7. Identifying, evaluating and correcting problems in your sales process?	_____	_____	_____
8. Tracking and evaluating sales performance based on regular reports?	_____	_____	_____

## B. Marketing Systems

*Do you have a system for... ?*

	Yes	No	N/A
1. Insuring that your marketing process is reaching your most probable customer?	_____	_____	_____
2. Determining the number of new prospects you need?	_____	_____	_____
3. Getting to know who your preferred customers are and directing your marketing to that customer?	_____	_____	_____
4. Designing an effective advertisement plan directed to your most important consumer?	_____	_____	_____
5. Creating an image for your business to attract more customers?	_____	_____	_____
6. Determining the most effective advertisement to produce results?	_____	_____	_____
7. Tracking and evaluating the results of your advertising?	_____	_____	_____
8. Evaluating past ad results and calculating the cost effectiveness of those ads?	_____	_____	_____

## C. Management Systems

*Do you have a system for... ?*

	Yes	No	N/A
1. Planning your work to allow the most productive use of your time?	_____	_____	_____
2. Defining the organizational structure of your business to evaluate its effectiveness?	_____	_____	_____
3. Organizing your company to assure your business will run effectively in your absence?	_____	_____	_____
4. Scheduling your work to enable you to produce more in less time?	_____	_____	_____
5. Analyzing and evaluating your business to determine if expansion is feasible or desirable?	_____	_____	_____
6. Organizing, processing and storing your paperwork in an efficient and accessible manner?	_____	_____	_____
7. Categorizing, organizing and setting up your files?	_____	_____	_____
8. Organizing and maintaining an orderly work space?	_____	_____	_____
9. Assessing current and future operating needs to determine whether any new or additional equipment/materials are necessary?	_____	_____	_____

## D. Production Systems

*Do you have a system for... ?*

	Yes	No	N/A
1. Scheduling work or jobs to assure timely completion?	_____	_____	_____
2. Identifying and tracking high turnover and profitable inventory?	_____	_____	_____
3. Scheduling workers to make more efficient use of their time?	_____	_____	_____
4. Utilizing costing formulas to determine your pricing structure?	_____	_____	_____
5. Writing down the work procedures so that they can be taught to others?	_____	_____	_____
6. Calculating how long it will take to complete a job or perform your service for your customers?	_____	_____	_____
7. Calculating and evaluating your production costs?	_____	_____	_____
8. Controlling all processing activities to assure prompt service to your customers?	_____	_____	_____
9. Forecasting workloads to allow you to schedule enough work to keep your people busy?	_____	_____	_____
10. Ensuring your customers are satisfied?	_____	_____	_____

## E. Finance Systems

*Do you have a system for... ?*

	Yes	No	N/A
1. Creating profit/loss documents?	_____	_____	_____
2. Forecasting income so you can pay your bills on a timely basis?	_____	_____	_____
3. Preparing financial statements to set up sound credit relationships with your suppliers?	_____	_____	_____
4. Forecasting future income and monitoring expenses to evaluate your profit status?	_____	_____	_____
5. Evaluating overhead costs to determine whether additional personnel are feasible or necessary?	_____	_____	_____
6. Recording your daily cash receipts and creating reports?	_____	_____	_____
7. Calculating and tracking your operational costs?	_____	_____	_____
8. Planning future equipment or material needs?	_____	_____	_____
9. Collecting money owed you in a systematic and depersonalized manner?	_____	_____	_____
10. Assessing the profitability of your inventory to avoid carrying unprofitable and slow moving items?	_____	_____	_____
11. Defining the overall financial goals of your company and setting budget controls to attain them?	_____	_____	_____
12. Identifying and setting up those documents and records you need to operate your business profitably?	_____	_____	_____

## F. Staffing Systems

*Do you have a system for... ?*

	Yes	No	N/A
1. Recruiting new staff effectively?	_____	_____	_____
2. Effective hiring of new staff?	_____	_____	_____
3. Developing job descriptions for all staff?	_____	_____	_____
4. Training of all staff effectively?	_____	_____	_____

1. What are three of your greatest concerns at this time?

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2. What specifically would you like your company to develop into next year? How would you like it to look if you could have it exactly the way you want?

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3. If your business were operating just like you described it, how would you benefit and what would your role in it be?

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4. What do you feel are the major obstacles standing in your way? (Please be specific)

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