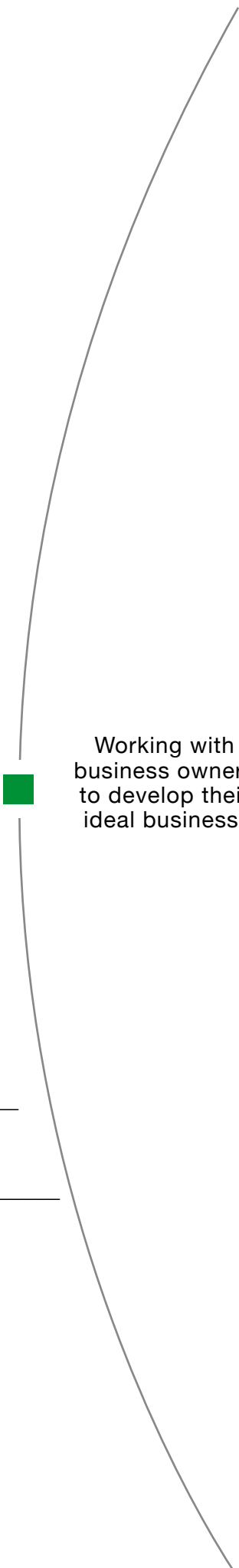




Roger
Lane

CONFIDENTIAL BUSINESS ANALYSIS



Working with
business owners
to develop their
ideal business.

Name: _____

Company: _____

PO BOX 380
HANA, HAWAII
96713
(808) 248-7804
fax (808) 248-7844

EMAIL
roger@rogerlane.com

www.rogerlane.com

We are about to participate in an exciting and productive process together, the completion of a complimentary *Business Development Analysis* of your business.

Thousands of small business owners have taken advantage of the opportunity provided by completing this Analysis. By looking at their business through someone else's eyes, most have come to realize new opportunities for increasing personal income, business profits, and the productivity of themselves and their people.

To assist me in understanding you and your business better, the following series of checklists should be completed by you prior to beginning your Analysis. These checklists are divided into two major categories: Key Concerns and System Solutions.

The first group of checklists - **Your Key Concerns** - will help us to identify the specific problems you experience on a day-to-day basis in the five key areas of your business: Sales, Marketing, Management, Production, and Finance.

The second group - **Your System Solutions** - will help us to identify the specific solutions in the form of systems you have already developed or need to develop to eliminate those problems and the frustrations caused by them.

It is important for you to understand that I come to your business with a considerable amount of experience eliminating the problems most business owners have. That experience has created a very specific point of view; that problems in business are caused by the absence of two essential things: information (what needs to be done and how to do it), and systems (the processes and procedures through which that information is implemented in the business to produce practical and quantifiable results).

What has been found to be true is that most business owners are paying dearly for the absence of both information and systems in the only way they can... by working much too hard and for much too little.

Once you have completed these checklists and sent me a copy, I will help you to analyze the results; first, by identifying specific areas of opportunity to increase your control over your business; and, second, by establishing priorities for pursuing these opportunities together, should such a relationship be justified by what we find.

Whatever transpires between us, I welcome this opportunity to be of service to you. I trust the process will provide you with a renewed sense of clarity, direction, and momentum, the three essential prerequisites for the development of your business, as well as your life.

Sincerely,
Roger Lane

Confidential Business Questionnaire

| | |
|---------|-------------|
| Name(s) | Referred By |
|---------|-------------|

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>(Check one)</i> | <input type="checkbox"/> Sole proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Tax-Exempt/Government Organization | | |
| How many owners are there? | <table border="1"> <tr> <td></td> <td><i>Are any owners related? How?</i></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? | _____Management _____Non-Management (Union) _____Non-Management (Non-Union) | | |
| 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 an X 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 an X in each of the appropriate boxes.

| | Past | Now | Future | N/A |
|-----------------------------|------|-----|--------|-----|
| Example 1. Not enough sales | X | X | X | |

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.

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

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

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

D. Product Key Concerns

| | Past | Now | Future | N/A |
|--|-------------|------------|---------------|------------|
| 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

| | Past | Now | Future | N/A |
|--|-------------|------------|---------------|------------|
| 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 me 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 breakeven point is | _____ | _____ | _____ | _____ |
| 10. I can't afford any new equipment | _____ | _____ | _____ | _____ |
| 11. My cashflow 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 sufficient 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 X 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 consumer? | _____ | _____ | _____ |
| 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 over all 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 profitability? | _____ | _____ | _____ |

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?

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

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

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