Questionnaire

**Key Facts About Your Business:**

Client Name:

Company Name:

Company Website (if you have one):

Company Phone Number:

Company Address (specify if home office):

Company Description:

How long have you been in business?

How many partners or owners of the business?

What is the organizations tax status?

Do you have a bookkeeper and/or an accountant? Are you concerned about paying too much on taxes or not taking advantage of business tax benefits?

How many employees? Part-time? Contract workers?

Are you currently offering a comprehensive benefits package? If yes, what are you offering?

Do you have any business licenses, sales permits, business insurance?

Is there an exit strategy/succession plan in place for your company? Business continuity plan?

What are your current monthly revenues?

What is your current monthly number of transactions? (Typically a few large sales or many small sales? Which point of sales system (know your rates)?)

What is your current monthly profit (are you happy with this number)?

**Reaching the End Result**

What are your current long-term (5 year) goals for your business?

What are your current short-term (1 year) goals for your business?

How do you see yourself achieving these goals?

What holds you back in taking the next step for your business?

What are your main challenges you face with your business?

What techniques and strategies do you regularly use for your business?

If there was on thing you could change about your business in the next 90 days what would it be and why?

**Branding and Customer Experience:**

What first impression are you trying to create with your brand? (e.g. established, safe, cutting edge, friendly, easy to use)

What’s the problem your product or service helps solve for them or what opportunity does it allow them to take advantage of?

What products and/or services do you provide? Please provide a brief explanation.

1)

2)

3)

Who are your customers/clients for each of the products and services above? (e.g. Size of targeted companies or customer demographics such as primarily male or female of a certain age or income level?)

What is the basic process that a prospect would go through when they first make contact with your business?

What are some additional products or services you could be cross selling or up-selling to your current clients?

Do you have a database? If so, how often do you stay in contact with existing customers?

**Current Marketing Efforts (traditional and new media marketing):**

What are your past and present marketing activities?

Which ones worked? Which ones didn’t?

Do you have funds set aside for marketing?

If yes, how much money do you realistically have for marketing your product/service? If no, are you interested in a loan?

Do you currently have a customer loyalty program (Email marketing, monthly newsletter, size of email list)?

Do you have an event calendar on your website, in emails, promote events to community?

Who controls your website(s)? What website pages do you have content on or can you have changed? Do you have the ability to change the look of the site?

How often do you update Facebook, Twitter, LinkedIn?

Are you in partnership with any associations or chambers?

# Competition:

Who are your competitors or perceived competitors? List at least 3 with their websites… and don’t say you don’t have any! (List anything in particular you may like about their sites, may not like, or stands out to you that is important for us to know.)

1)

2)

3)

Which one are you most concerned about?

Is your business in a relatively competitive/saturated market or are there only a handful of companies making the same/similar offer?

Are you priced the same, lower or higher than competitors?

**Working with Piedmont Avenue Consulting:**

What does success look like?

What improvements in efficiency are you looking for in your business?

What is your decision making process to get started on working together?

What is the budget for results focused efforts to increase sales, customer retention, etc.?

Do you have staff or resources to learn from Piedmont Avenue Consulting how to carry out the work or would you need outside assistance to get projects done?

What is your timeline for achieving success (Understanding marketing or any business growth plan is not a one month project)?

Thank you for completing this questionnaire. Please send in your responses to David@PiedmontAve.com by typing in your answers and emailing the document back or scanning and emailing the document with your handwritten answers.