



General Questionnaire

- 1) What are your top goals this year?
 - a) Financial -
 - b) Personal -
- 2) Where do you see your company in 5 years?
- 3) How long have you been in business?
- 4) Do you own or operate any other businesses?
- 5) Are you interested in planning an exit?
- 6) What are your strengths in your business?
- 7) What are your weaknesses in your business?
- 8) How much do you want to be working each week?
- 9) How much vacation time do you have and how much do you want?
- 10) How do you see your business stands out or apart from your competitors?
- 11) Do you want/have a marketing plan?
- 12) Do you perform a financial analysis monthly, quarterly, yearly? - Follow the money?
- 13) What are the most important aspects of your business? Money? Reach? Influence? Followers?
- 14) How do you know how you are performing in the most important aspect of your business?
- 15) Do you have any partners? Advisors? Mentors?
- 16) Who are the ultimate decision makers in your business?
- 17) Why are you seeking consulting services?
- 18) Name your three largest roadblocks / problems...
 - a)
 - b)
 - c)
- 19) What have you tried to correct these issues?
- 20) How prepared are you to change things that are not working?
- 21) How will you know this integrated consultancy is successful?