

Tell Us About Your Business

We are looking forward to meeting with you to discuss your business needs. In preparation for that meeting, it will help us better assist you if you can provide some information ahead of time. Please answer the following questions as well as you can and bring this form to your meeting.

Business Name _____

Contact Person _____

1. How long have you been in business?

2. What type of business is it?

Sole Proprietorship

Corporation

Limited Partnership

Limited Liability Partnership (LLP)

Limited Liability Company (LLC)

Other

3. Describe your business, including your product and/or service offerings.

4. Have you operated a business before? If yes, give brief summary of your experience.

5. What are your goals for your business? (For example, expand your business and hire more employees; make a living for yourself; support your family; open three more locations; become a national chain.)

6. What are your key concerns related to your business?

7. Who are your major competitors and what do they offer?

8. How would you describe your ideal customer(s)? (Consider age range, income, proximity to your location, personal interests, gender, etc.)

9. What do you know about your market? (Consider size of market, geographic area, whether it's growing or shrinking, who the key players are, demand for the product or service)

10. Which segment (product/service) of your business produces the greatest revenue? (For example, "80% of our revenue comes from oil changes and 20% from other auto repair services.")

11. What have you done to market your business and with what results?

12. In one sentence, define your core offering to your customers. (For example, "We offer employee leasing services to small and medium-sized businesses." or "We sell machine cutting tools to small manufacturers.")

13. Do you have a company website? Please list URL:

14. What role does your company website play in your marketing efforts?

15. Do you have a business plan? Yes No

16. Have you completed a balance sheet? Yes No

17. Have you completed a cash flow analysis? Yes No