

Identifying Key Business Information Needs

Company Information

Name of Company: _____

Business Structure:

- | | |
|--|--|
| <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Limited Liability Partnership (LLP) | <input type="checkbox"/> Limited Liability Corporation (LLC) |
| <input type="checkbox"/> S-Corporation | <input type="checkbox"/> C-Corporation |
| <input type="checkbox"/> Non-profit | <input type="checkbox"/> Other _____ |

Officer/Title: _____

Officer/Title: _____

Industry: _____

NAICS/SIC Codes: _____

Year Established: _____

Contact Name: _____ Phone: _____

Contact Title: _____ Email: _____

Total Number of Employees:

Full Time: _____ Part-Time: _____

Other (please describe): _____

Annual Sales Range:

- | | |
|--|--|
| <input type="checkbox"/> \$750,001 - \$1 Million | <input type="checkbox"/> \$1 - \$2 Million |
| <input type="checkbox"/> \$2 - \$5 Million | <input type="checkbox"/> Over \$5 Million |

Website: _____

Company Plans

1. 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.”)
2. 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.)
3. What are your key strategies for growing your business?

Customers and Market

4. Describe your best customers within your key market segment(s). Include demographic or geographic characteristics, percentage of sales, years doing business, etc.
5. Why do they choose you? What are your leading competitive advantages?

6. Please describe your primary market(s). Include size of market, whether shrinking or growing, geographic location, demographics, lifestyle, and customer motivation to purchase.

7. Do you have any significant secondary or sub-markets?

Competition

8. Describe your major competitors and their offerings (include whatever you know about their revenues, market share, and strategies)

9. What are the top reasons customers buy from your competition?

External Forces

10. What are the most important market forces or trends in your industry that are increasing or decreasing your business prospects?

11. What technological changes will affect your industry in the future?