

Business Health Check Questionnaire

Welcome to your growth!

This questionnaire is the first phase of MarketAtomy's Business Check Up Program.

Please answer each question as accurately as possible so that our analysis of your answers leads us to come up with a diagnosis which is pertinent and relevant for you.

Section 1 - Business Information

Please provide us with some information about your business.

1. What is the name of your business?
2. What's your business address?
3. What's your business phone number? (No robo calls, we promise!)
4. What's your business website address?
5. When did you first start your business?
6. What type of business do you have?
7. What's the legal status of your business?
 1. Sole Proprietorship
 2. Partnership
 3. "C" Corporation
 4. "S" Corporation
 5. LLC (Limited Liability Company)
 6. Not Formally Registered
8. Are you a new startup or an established business?
 1. I've taken the leap! I'm a new/startup business
 2. I'm established
9. Who is the primary point of contact for the business?
10. What's the best phone number for the primary contact? (Again, no robo calls... we promise!)
11. What's the best email for the primary contact?

That's it for section one! You've done awesome so far! Did you know that businesses who take the time to answer detailed questions have an 85% greater chance of success than ones who don't?

Section 2 - Business Preparation

The following questions will help us to gain understanding about how you prepared before setting up your business.

1. Do you currently have a Vision Statement for your business?
 1. Yes!
 2. No!
 3. What's That?
2. Do you currently have a Mission Statement for your business?
 3. Yes!
 4. No!
 5. What's a mission statement?
6. Have you created a Business Model for your business?
 1. Yes I have
 2. No I have not
 3. I'm not sure
7. Have you created a Financial Model for your business?
 8. Yes
 9. No
 10. I'm not sure
11. Have you created a Product/Service Pricing Model for your business?
 1. Yes
 2. No
 3. I'm not sure
12. Have you created a Go-To-Market Model for your business?
 13. Yes
 14. No
 15. I'm not sure
16. Have you created a One-Page Investor Summary for your business?
 17. Yes
 18. No
 19. What is that?
 20. Not Applicable
21. Have you created a Private Placement Memorandum (PPM) for your business?
 - a. Yes
 - b. No

1. What is that?
2. Have you created a Forward Looking (Safe Harbor) Statement for your business?
3. Yes
4. No
5. What is that? 10.
6. Is your business currently generating revenue?
 1. Yes
 2. No
7. If not, how long do you predict it will take to get there?
8. Less than 12 months
9. Within 13-18 months
10. Within 19-24 months
11. Not Applicable
12. What are some of the key problems you see with your business right now?
(Select all that apply)
 1. Lack of Capital
 2. Lack of Focus
 3. Lack of Customers
 4. Lack of Skills
 5. Lack of Cost Control
 6. Lack of Management/Leadership

Way to go! You've completed section 2, and you're well on your way to success. Did you know that by answering many of the same questions you just did, Warren Buffett was able to build Berkshire Hathaway into a company that touches 90 percent of your life each day?

Section 3 — Ownership Structure

Please answer the following questions to give us a better understanding of the ownership structure of your business.

1. Are you the sole owner of your business?
2. Yes
3. No
4. Is there someone else you need to get approval from to make business decisions?
5. Yes
6. No

7. Are you or any other owners of your company women, minorities, veterans?
8. Yes
9. No
10. Is your company registered with the appropriate state registry?
11. Yes
12. No
13. What is the format you registered as?
14. LLC
15. C-Corp
16. S-Corp
17. Other
18. Is there stock set aside for future investors and/or employees?
19. Yes
20. No
21. Don't Know
22. Not Applicable
23. Have you established any strategic alliances or partners?
24. Yes
25. No
26. In Process

Section 3 is DONE, You're on a roll! Did you know that Amazon, Google, and Facebook all experienced rapid growth with strategic alliances, partnerships, and setting aside equity for employees?

Section 4 — Business Funding Position

This section helps us to gain a basic understanding of the financial position of your business.

- 1. Looking generally at your business, how would you describe its financial position? (please select all that apply)
 1. Well-funded and in good shape
 2. Funding OK but could be better
 3. The financial situation is quite tight
 4. The financial position is very difficult
 5. We are in danger of running out of money and having to close the company
- 6. How has the business been financed to date? (please select all that apply)
 7. Personal financial resources

8. Friends and Family resources
9. Investor funding
10. Crowd funding
11. Revenues generated from sales
12. How much money have you and other founders invested in the business to date?

- a. Up to \$25,000
- b. \$26,000 to \$50,000
- c. \$51,000 to \$100,000
- d. \$101,000 to \$250,000
- e. \$251,000

1. Are you looking to attract additional investment funds?

- a. Yes
- b. No
- c. Not Sure

1. If so, how much are you looking to raise?

- 1. Up to \$50,000
- 2. \$51,000 to \$100,000
- 3. \$101,000 to \$500,000
- 4. \$500,001 to \$1,000,000
- 5. \$1,000,000
- 6. Not Applicable

2. What would you need the money for? (please select all that apply)

1. Sales/Marketing
2. Building Inventory
3. Building a Technology Platform
4. Manufacturing
5. Patent Application
6. Adding Executive Staff
7. Adding Operations Staff
8. Acquiring Equipment
9. Product/Service Research and Development
10. General Expansion

11. Not Applicable
3. How much do you presently have in immediately available funds, either already in the business or to inject into the business?
 1. No Money Left
 2. Up to \$10,000
 3. Up to \$25,000
 4. Up to \$100,000 Not Sure

Section 4 is all done! Did you know that by completing section 4, you put yourself in a much better position to discuss your needs with investors and financial institutions? Knowing your numbers, and your needs, can be the difference between success and failure.

Section 5 — Business Milestone Achievements

This section will help us to understand what you have accomplished to date in your business.

1. What Milestones have been achieved to date? (Please check all that apply)
 1. Business appropriately established legally
 2. Strategic Plan Developed
 3. Business Model Developed
 4. Financial Projections Developed
 5. Business Plan Developed
 6. Branding Efforts Identified
 7. Marketing Plan Developed
 8. Business Launched
 9. Trade Show participation
 10. Already Generating Revenue
 11. Sales Plan/Strategy Developed
 12. Executive Team Hired
 13. None
2. What Milestones are currently in the pipeline? (Please check all that apply)
 - 1. Strategic Plan Development
 2. Business Model Development
 3. Financial Projections Development
 4. Business Plan Development
 5. Branding Development
 6. Marketing Plan Development
 7. Sales Strategy Development

8. None

3. How are you performing toward those milestone achievements?

1. On schedule - no expected issues. Everything on track
2. Currently on schedule but see some troubling areas up ahead and worried
3. Lagging behind schedule and concerned about how to move forward
4. Way behind schedule and struggling to get back on track
5. Are the people in place to help meet these milestones?
6. Yes
7. No
8. I'm Not Sure
9. Are you building this business for the long-term or just to hit- and-run?
10. Grow the business and sell it
11. Pass the business on to heirs
12. Franchise or License
13. Not sure
14. What is your exit strategy?
15. Grow the business and sell it
16. Pass the business on to heirs
17. Franchise or License
18. Not sure

Section 5 is complete! You are awesome. :-) By having solid plans in place, your team can remain on the same page and headed in the same direction related to the mission, vision and goals of the business.

Section 6 - Business Structure and Organization

This section will help us to understand how you run the day-to-day activities of the organization, including identifying gaps that may keep you from achieving your goals.

1. Is this a home office company or will you need additional office space?
 1. Home Office to start
 2. Home Office long-term
 3. Shared Office Space
 4. Incubator Office space
 5. Our own office space
2. How many people do you employ today in total?

- 1. 1 - Just Me
 - 2. 2-3
 - 3. 4-10
 - 4. 11-20
 - 5. 21-50
 - 6. 50+
- 3. How many people will you employ in total at full growth?
 - 1. 1 - Just Me
 - 2. 2-3 .
 - 3. 4-10 .
 - 4. 11-20 .
 - 5. 21-50
- 4. Do you have an HR department internally, or is it outsourced?
 - 1. Internal Department
 - 2. Outsourced
 - 3. No HR Department Yet
- 5. Do you have an IT department internally, or is it outsourced?
 - 1. Internal Department
 - 2. Outsourced
 - 3. No IT Department Yet
- 6. Will you be seeking to hire new employees over the next 12 months?
 - 1. Yes
 - 2. No
 - 3. Not Sure
- 7. Have you used external consultants to date?
 - 1. Yes
 - 2. No
 - 3. Under Consideration
- 8. Would you consider using part-time consultants the key functions within the company?
- 9. Yes
- 10. No
- 11. Maybe
- 12. What skill gaps do you currently feel you need to fill in order to grow your business? (Please check all that apply)
- 13. Executive Management Team
- 14. Sales Team
- 15. Marketing Team

- 16. Financial Team
- 17. Technology Team
- 18. Production Team
- 19. Administration
- 20. Not Sure
- 21. None

Section 6 is a wrap!

Being able to quickly identify needs and engage the right advisors/consultants can help you to compound opportunity more quickly.

Section 7 - Executive Management Team

This section will help us better understand the key corporate functionalities that apply to your business and will help us identify any gaps in management.

- 1. Do you have Executives other than yourself?
 - 2. Yes
 - 3. No
- 4. What key executive functions are currently in place? (Please check all that apply) .
 - 5. Chief Executive Officer (CEO)
 - 6. Chief Operating Officer (COO)
 - 7. Chief Financial Officer (CFO)
 - 8. Chief Technology Officer (CTO)
 - 9. Chief Marketing/Sales Officer (CMO/CSO)
 - 10. Chief Science Officer
 - 11. Chief Strategy Officer
- 1. Have any of your key executive functions previously had successful business ventures? (Please check all that apply)
 - 1. None of them
 - 2. Some of them
 - 3. All of them
- 2. Do any of the Key Executives have Founder shares in the business?
 - 3. All
 - 4. Some
 - 5. None
- 6. Have any of the Key Executives invested into the business?
 - 7. All

- 8. Some
- 9. None
- 10. Are all executive team members direct employees of the business?
- 11. Yes
- 12. No
- 13. Some are 1099 Consultants
- 14. Do you have a board of directors?
- 15. Yes
- 16. No
- 17. Do you have an advisory board?
- 18. Yes
- 19. No
- 20. Do you have external professional advisors, consultants or coaches in any specific area of activity?
- 21. Yes
- 22. No

Section 7 is complete... you are becoming a master of the business universe!

Did you know that boards of directors and boards of advisors are key components in the success of your business? They provide a clear outside perspective, experience and well established relationships that can help you to grow.

Ready for more?

Section 8 — Product or Services

This section will help us to evaluate the viability of your products and/or services as these relate to market demand.

- 1. What do you sell?
 - 1. A single product
 - 2. Multiple products
 - 3. A single service
 - 4. Multiple services
 - 5. Both products and services
- 2. How do you characterize your business?
 - 1. High volume, low margin
 - 2. High margin, low volume
 - 3. High volume, high margin
 - 4. Low volume, low margin

3. If you are a service oriented business, are you the provider/creator of your service?
 1. We do it all
 2. We outsource all creative
 3. We subcontract all providers
 4. We are a mix of inhouse/outourced
4. If you are a product oriented business, are you the manufacturer of your product?
 1. We manufacture all in the USA
 2. We manufacture all off-shore
 3. We out-source to other suppliers
 4. We are a mix of inhouse/outourced
5. Do you have an existing Minimally Viable Product (MVP) for your business?
 1. Yes
 2. No
 3. Working on it
6. What is your expectation of Net Profit before Taxes?
 1. 0-5%
 2. 5%-10%
 3. 10%-15%
 4. 15%-20%
 5. 20%-25%
 6. Over 25%
7. Would your products and/or services be considered "must have" or "Like to have"?
 1. Must have
 2. Like to have
 3. Both
 4. 'm not sure
8. Do you have to drive demand, or does the market take care of it?
 1. We drive demand
 2. Market drives demand
 3. Both
 4. I'm not sure

You're already through section 8... it's confirmed, you're on a roll! Did you know that when you clearly understand where your product or service fits in the marketplace,

you also clearly understand your competition? This helps you to define your competitive edge.

Section 9 — Intellectual Property (IP)

This section will help us determine the ongoing potential for your business, as well as any risks that may need to be addressed.

1. Do you have any proprietary technology or manufacturing processes
 1. Yes
 2. No
 3. Not sure
 4. Not applicable
2. Do you have any patents, copyrights, or trademarks filed or pending?
 1. Yes
 2. No
 3. In process
3. Are you satisfied that your IP is being protected at the manufacturing level?
 1. Yes
 2. No
 3. Not sure
 4. Not applicable :
4. Do you work with an established IP attorney?
 1. Yes
 2. No
 3. Under consideration
5. Do you suffer any issues related to IP infringement?
 1. Yes
 2. No
 3. I'm not sure
6. Do you suffer problems with counterfeit products competing with you in the market?
 1. Yes
 2. No
 3. I'm not sure

Just like a fine wine... you've finished section 9!

You're building the ultimate roadmap to success for you and your business. Ready for more?

Section 10 - Scalability

This section will help us to identify the ability for your business grow.

1. Where are your products/services currently being sold?
 1. Not yet making sales
 2. Locally
 3. Regionally
 4. Nationally
 5. Internationally
2. Is your business model one which will enable you to significantly scale up your business?
 1. Yes
 2. No
 3. Not sure
3. How do you see the future for your business?
 1. Local (Mom & Pop)
 2. Within your city or state
 3. Nationwide
 4. International
4. How long do you see yourself becoming profitable?
 1. Within 6 months
 2. Within 1 year
 3. Within 2nd year
 4. Longer than 2 years
5. Are you exploiting the company's full potential for "Geographical" scalability?
 1. Yes
 2. No
 3. I'm not sure
6. Would you consider setting up a physical presence in overseas markets?
 1. Yes
 2. No
 3. I'm not sure
7. Are you exploiting the company's full potential for "Market" scalability?
 1. Yes
 2. No
 3. I'm not sure
8. Are you exploiting the company's full potential for "Product" scalability?
 1. Yes

- 2. No
- 3. I'm not sure

You've done it again... that's a wrap for section 10! Great work. Did you know that by answering the questions in section 10, you increase your chances of opening up new markets for your product/service by over 70 percent?

Section 11 — Revenue

This section will help us to evaluate current, realistic and potential revenue options for your business.

- 1. Do you currently have more than ONE revenue stream?
 - 1. Yes
 - 2. No
- 2. Are you planning to increase the number of revenue streams?
 - 1. Yes
 - 2. No
 - 3. I'm not sure
- 3. Are your sales patterns consistent or cyclical?
 - 1. Consistent
 - 2. Cyclical
 - 3. I'm not sure
- 4. Are you happy with the performance of all the revenue streams?
 - 1. Yes
 - 2. No
 - 3. Could be better
- 5. On a scale of 1 to 5, how realistic is it for you to develop additional revenue streams?
- 6. What are the limiting factors for developing additional revenue streams?
(Please check all that apply)
 - 1. Money
 - 2. People
 - 3. Technology
 - 4. Competition
 - 5. Knowledge

Section 11, done! When you understand what revenue streams you have, you're also able to see others that you may not have thought about.

Section 12 - Sales

This section will help us to understand what processes you have in place to fill your sales funnel and to attract new customers.

1. Where are your sales made?
 1. Business to Business (B2B)
 2. Business to Consumer (B2C)
 3. Both
2. Have you developed revenue projections for the next 2 to 3 years?
 1. Yes
 2. No
3. Have you developed revenue projections for the next 3 to 5 years?
 1. Yes
 2. No
4. If yes, how frequently do you track your performance against these projections?
 1. Daily
 2. Weekly
 3. Monthly
 4. Quarterly
 5. As and when we can get to it
 6. Not applicable
5. Do you have an internal sales force?
 1. Yes
 2. No
6. How many people in the company are responsible for making sales?
 1. Just me
 2. 2-5
 3. 5+
7. Are your salespeople full time or part time?
 1. Full time
 2. Part time
 3. Some of each
8. Do you have an established sales process in place?
 1. Yes
 2. No
 3. I'm not sure
9. How are your sales personnel compensated? (Please check all that apply)
 1. Commission only

- 2. Salary only
 - 3. Salary plus commission
 - 4. Periodic bonuses
10. Is your sales team meeting required goals?
- 1. Yes
 - 2. No
11. Do you have an in-house sales training program?
- 1. Yes
 - 2. No
 - 3. Not applicable
12. Do your field sales people also manage ongoing customer relationships?
- 1. Yes
 - 2. No
13. How long is the sales cycle?
- 1. Less than 30 days
 - 2. Between 31-90 days
 - 3. More than 90 days
14. Do you export/work internationally?
- 1. Yes
 - 2. No

That's it for section 12.

Just a reminder... you're awesome. And, you're building the most solid future for your business!

Section 13 — Customer Identification

This section will help us to understand the solidity of your sales performance, who your ideal customer is, and how you reach them.

- 1. What percentage of your total sales is generated by your top 5 customers?
 - 1. Greater than 75%
 - 2. Between 40% and 75%
 - 3. Less than 40%
 - 4. Less than 25%
- 2. How would you describe your target customer list (Book of list)?
 - 1. Small list of focused potential customers
 - 2. Solid list of several potential customers
 - 3. Long list of many potential customers

4. Our customers come to us
5. What list?
3. How would you describe your target market?
 1. Limited, but highly targeted
 2. Solid market potential
 3. Massive market potential
4. Do you have a clear profile of your ideal customers?
 1. Yes
 2. No
 3. I'm not sure
5. Are your customers readily accessible geographically?
 1. Yes
 2. No
6. Are your customers readily accessible digitally?
 1. Yes
 2. No
7. Do you have previous experience successfully selling other products/services to this customer set?
 1. Yes
 2. No
8. On a scale of 1 to 5, how would you rate your customer relations overall?
9. Do you get referral business from existing customers?
 1. Yes
 2. No

Section 13 = DONE!

Did you know that understanding your ideal customer can massively compound your success? Amazon, Apple, and Costco commit tremendous resources to understanding customers.

Section 14 — Market Dynamics

This section will help us to understand how well you know your market and whether the demand is sufficient to support your goals.

1. On a scale of 1 to 5, how well defined is the size of your market?
2. Do you consider your company to have an established presence in its markets?
 1. Yes

2. No
3. On a scale of 1 to 5, how well do you feel you have penetrated those markets?
4. Have you conducted a Strengths, Weakness, Opportunities and Threats (S.W.O.T.) analysis on your business?
 1. Yes
 2. No
 3. What's that?
5. Have you identified your primary competitive advantage?
 1. Yes
 2. No
 3. I'm not sure
6. Do you have a plan to overcome your competitive disadvantages?
 1. Yes
 2. No
 3. I'm not sure
7. Do you have serious competition?
 1. Yes
 2. No
 3. I'm not sure
8. Are they powerhouse companies with massive resources you cannot match?
 1. Yes
 2. No
 3. I'm not sure
9. How do your competitors see you in your markets?
 1. Not aware of us
 2. Insignificant player
 3. Significant player
 4. Significant threat
 5. I'm not sure
10. Do you have a handle on marketing trends affecting your business?
 1. Yes
 2. No
 3. I'm not sure
11. Do these represent opportunities or threats to the business in the future?
 1. Opportunities
 2. Threats
 3. Both

12. Is your market need well-known, or will you be required to educate your market as to the problem the need solved first?

1. Issue Well Known
2. Need to Educate market
3. Modest market awareness
4. Brand new market need

That's a wrap for section 14.

Protip: Two key questions to ask when you are tackling incumbent competitors... 1. How is their bread buttered? 2. What is it they can't afford to say or think? !

Section 15 - Marketing

This section will give us a better understanding of what you have done to date to create awareness of, and brand your company and its products/services in your markets.

1. Does your company have a dominant brand identity?
 1. Yes
 2. No
 3. I'm not sure
2. Does your company have registered domain names to support its market presence?
 1. Yes
 2. No
 3. I'm not sure
3. Does your company have a professionally designed brand logo?
 1. Yes
 2. No
 3. I'm not sure
4. Do your products/services have clear brand identities?
 1. Yes
 2. No
 3. I'm not sure
5. On a scale of 1 to 5, how do you perceive your company's image today?
6. If you rated low, do you know why?
 1. Yes
 2. No
 3. I'm not sure

7. Have you made efforts to strengthen your image in the past 12 months?
 1. Yes
 2. No
 3. I'm not sure
8. Do you have a marketing strategy incorporated into a marketing plan?
 1. Yes
 2. No
9. How often is this marketing strategy revisited and updated?
 1. Monthly
 2. Quarterly
 3. Annually
 4. Never
 5. Not applicable
10. Do you have an identified marketing budget?
 1. Yes
 2. No
11. What percentage of your total gross revenue is attributed to marketing?
12. Do you have anyone specifically in charge of marketing in house or outside?
 1. Yes
 2. No
13. Is there a corporate focus on the marketing of the company?
 1. Yes
 2. No
14. What channels are you using to promote the business currently?
 1. Social Media platforms and Website
 2. Networking
 3. Word of mouth/Referrals
 4. Outbound marketing venues (i.e. print, display, radio, TV)
 5. Inbound marketing venues (i.e. blogging, podcasting, email newsletters, webinars)
 6. "Touch" based marketing (i.e. presentations, live training events, tradeshow, live demos)
 7. No current marketing efforts
15. Are you active on social media?
 1. Yes
 2. No
16. Do you have in-house expert on social media or is it out-sourced?
 1. In House

2. Out Sourced
 3. A Mix of in house and out sourced
17. Are your customers on social media?
1. Yes
 2. No
 3. Some
 4. I'm not sure

Section 15 is a wrap.

You're really on a roll now!! Did you know that HOW you communicate with potential customers is as important as reaching them? Speaking the right language is critical.

Section 16 - Financial Management

This section will help us to get a better understanding of the current financial snapshot for your business

1. Have you been actively maintaining ongoing record keeping for financial purposes?
 1. Yes
 2. No
2. Do you have internal bookkeeping capabilities?
 1. Yes
 2. No
3. Do you have internal accounting staff or is it out sourced?
 1. In house
 2. Outsourced
 3. Do it myself
4. Do you employ an external CPA or accountant to prepare tax returns?
 1. Yes
 2. No
5. Do you feel that you have liquidity issues or cash flow problems?
 1. Yes
 2. No
6. Do you have the bank facilities and relationships in place to support cash flows?
 1. Yes
 2. No

7. Does the company carry any debt? (excluding equity investors)
 1. Yes
 2. No
8. If so, how much?
 1. Less than \$10,000
 2. Between \$11,000 and \$25,000
 3. Between \$26,000 and \$50,000
 4. Between \$51,000 and \$100,000
 5. Over \$100,000
9. Are you happy with your current banking relationship (s)?
 1. Yes
 2. No
10. Is your company profitable?
 1. Yes
 2. No
 3. Not Applicable
11. Have you reached breakeven?
 1. Yes
 2. No
 3. Not applicable
12. Are you able to determine if all of your product or service lines make money?
 1. Yes
 2. No
 3. I'm not sure
13. On a scale of 1 to 5, how closely do you monitor cash flows?
14. Do you have an internal financial management system that you use?
 1. Yes
 2. No
 3. I'm not sure
15. Does your company produce annual budgets?
 1. Yes
 2. No
16. Do you produce regular cash flow forecasts?
 1. Yes
 2. No
17. If so, how accurate have they proven to be to date?
 1. Very accurate (within 10%)
 2. Fairly accurate (within 20%)

- 3. Inaccurate (more than 20% out)
 - 4. I'm not sure
18. Do you compare your actual performance against your forecasts?
- 1. Yes
 - 2. No
 - 3. Sometimes
19. Are all of your taxes filed up to date?
- 1. Yes
 - 2. No

That's all for section 16.

Did you know that your company financials allow you to see the health of your business at a glance? Keeping them up to date and tracking them closely are important to your success.

Section 17 — Pricing Models

This section will help us to understand the profitability potential of your company.

- 1. Does the company have robust pricing models for all of its products?
 - 1. Yes
 - 2. No
 - 3. I'm not sure
- 2. Do you have a clear idea of your unit costs of production?
 - 1. Yes
 - 2. No
 - 3. I'm not sure
- 3. Are you selling to wholesalers/retailers/the public directly? (Please check all that apply)
 - 1. Wholesale
 - 2. Retail
 - 3. Consumer
 - 4. Not applicable
- 4. Is your pricing model dictated by competition or by profit goals?
 - 1. Competition
 - 2. Profit
 - 3. I'm not sure
- 5. If product based, do you offer value added "services" in addition to the company's offerings?

1. Yes
2. No
3. I'm not sure

That's it for section 17. Ready for more?

Section 18 — Cost Analysis

This section will help us to understand how you manage and control the company's costs and expenses.

1. Do you consider your company to have a cost problem in general?
 1. Yes
 2. No
 3. I'm not sure
2. If so, do you know where the problem lies?
 1. Yes
 2. No
 3. I'm not sure
3. Have you tried or been able to do anything positive to turn these problems around?
 1. Yes
 2. No
 3. Not applicable
4. Do you have any systems in place to control costs?
 1. Yes
 2. No
 3. Not applicable
5. Is there a cost control culture within your company?
 1. Yes
 2. No
 3. I'm not sure

That's all for section 18.

You're almost done with the most important steps you'll take in your business.

Section 19 - Production (For Manufacturing Companies)

This section will help us to understand the production processes in place along with quality control and safety measures.

If you're not a manufacturing company, these questions are optional.

1. Are you a manufacturing company?
 1. Yes
 2. No
2. Where are your products manufactured?
 1. Within the U.S.
 2. Outside of the U.S.
 3. Both
3. Are you satisfied with your manufacturing operations?
 1. Yes
 2. No
4. Do you suffer from quality control issues?
 1. Yes
 2. No
5. If manufacturing overseas, do you have a local rep looking after your interests?
 1. Yes
 2. No
6. Are you always able to fulfill orders on time?
 1. Yes
 2. No
7. Are you satisfied with your costs of production?
 1. Yes
 2. No
8. Do you have problems sourcing supplies and raw materials?
 1. Yes
 2. No
9. On a scale of 1 to 5, how much control do you have over your manufacturing activities?
10. Do you receive satisfactory credit terms from your suppliers?
 1. Yes
 2. No
11. Are you normally able to pay creditors on time?
 1. Yes
 2. No
12. Are you governed by Health & Safety or other regulatory bodies?
 1. Yes

- 2. No
- 13. Are you in compliance with all appropriate regulations and laws?
 - 1. Yes
 - 2. No
- 14. Are your company's internal production processes robust?
 - 1. Yes
 - 2. No
- 15. On a scale of 1 to 5, how engaged is your company regarding new product development?
- 16. Is anyone responsible for new product development?
 - 1. Yes
 - 2. No

That's a wrap for section 19. Two more to go!

Section 20 - Personal Assessment

This section will help us determine how you cope with the many stresses of being a leader within your company.

- 1. Are you permanently stressed out due to work issues?
 - 1. Yes
 - 2. No
- 2. What stressors seem to keep you up at night? (Check all that apply)
 - 1. Bill Payment issues
 - 2. Family issues
 - 3. Staffing/Payroll issues
 - 4. Chronic Health issue
- 3. Do you feel your work/life balance is skewed in the wrong direction?
 - 1. Yes
 - 2. No
- 4. Are you ever able to take time out?
 - 1. Yes
 - 2. No
- 5. Do you have a team in place to fill in gaps when you are away?
 - 1. Yes
 - 2. No
- 6. Do you feel like the company can operate effectively in your absence?
 - 1. Yes
 - 2. No

7. Do you have "Key Man" insurance or some other protective measure in place if you should become incapacitated?
1. Yes
 2. No
8. Are you able to pay yourself what you think you're worth?
1. Yes
 2. No
9. On a scale of 1 to 5: On an hourly basis, are you the best or worst paid person in your company?
10. Do you have a "legacy" plan in place for your business?
1. Yes
 2. No
 3. I'm not sure
11. Do you have a successor in mind?
1. Yes
 2. No
12. If so, is your successor being groomed to take over?
1. Yes
 2. No
13. Looking at your overall feelings about becoming a business owner, which answer best sums up your feelings?
1. Best thing I ever did
 2. I have good and bad days, but I generally feel like I made the right decision
 3. There are times when I seriously wonder if this was the right move
 4. I wish I hadn't done it
 5. I'm now too deeply locked in, so I have no option but to carry on

That's all for section 20. Just one more to go to for you to grow!

Section 21 - General

These questions are designed to give us some insight into how you view your company and its future.

1. Do you see any of the following looming external threats happening that could upset your business? (Please check all that apply)
1. Regulatory Changes
 2. Changes in Federal/State Law
 3. New Technological Advances

4. Market Shifts
 5. Increased Competition
 6. I'm not sure
2. Are there any internal weaknesses or threat that could hinder your growth as a company? (Please check all that apply)
 1. Financial
 2. Product/Service
 3. Management Team/Staffing
 4. Quality Control
 5. Weak Systems and Processes
 6. I'm not sure
3. Do you see any changes externally that could create great opportunities for growth?
 1. Yes
 2. No
 3. I'm not sure
4. Do you feel you already have the internal resources to exploit those opportunities?
 1. Yes
 2. No
 3. I'm not sure
5. On a scale of 1 to 10: How close is the company to reaching its full potential as it exists right now?
6. Would it require a significant capital injection to take it to another level?
 1. Yes
 2. No
 3. I'm not sure
7. Would it require an enhanced team to take it there?
 1. Yes
 2. No
 3. I'm not sure

That's It! Congratulations