

About You – New Client Form

Completing this questionnaire will help give us a picture of your current online situation from which to develop an action plan to do the things needed in your market.

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| Business Information | |
| 1. Your name: | Aidan Gregoire |
| 2. Your company name: | Go Lease it |
| 3. What is the one thing, the most important item, you need us to know about your business? | |
| We provide commercial lease financing on commercial equipment for businesses | |
| What problems do you solve for your customers? | |
| We help them get the financing required to acquire equipment to help their equipment grow | |
| When people talk about your business today, what do they say? Is there something you do that they want to tell their friends about? | |
| That our business is fueled by repeat, referral, and word of mouth business. We work hard to provide the financing that will work best for our clients. | |
| Website and Domain Name | |
| Primary Website | https://goleaseit.ca/ |
| Who is the primary domain name registered with? Do you have login access? | Amazon route 53 Yes, have login access |
| Do you have any other websites or domain names? What are they? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Who are they registered with? Do you have login access? | |
| List up to 10 terms people search for when looking for a business like yours. | |

- Heavy Equipment financing/leasing
- Semi truck financing/leasing
- Excavator financing/leasing
- Work truck financing/leasing
- Dump truck financing/leasing
- Skid steer financing/leasing

What are three or more websites that you love? What are the qualities you love about them?

1. Website #1 <https://uplend.ca/> - Icon art and colour palat
2. Website #2 <https://risecapital.ca/> - graphic art/pictures and simplicity
3. Website #3 <https://www.rhomepmvictoria.ca/> - application flow
4. ..
5. ..

Goals and Values

4. What would make this project a success?

Having a professional clean website that's more industry ambiguous with added credit app.

5. What are your business goals over the next:
 - 1 year? Expand into different industries
 - 3 years?
 - 5 years?

6. What is your founder's story? Why did you start your business, or why did the organization get created? What is the background? What was the goal? Is this is already written, please share it.

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| We started to show that equipment financing doesn't need to be difficult. |
| 7. What are your company's or personal core values? |
| We believe in small business and making things as straight forward as possible. |
| 8. Do you have any Mission, Vision, or Values statements? Please share. |
| Small business owners that believe in good, accessible friendly financing service which has the goal of helping our customers grow their business by getting financing for equipment they need when they need it |
| 9. Are you linked with any charities or organizations? Does your business play a role in the local community? |
| No |
| Products and Services |
| 10. Describe your products and services ranked from the most profitable or most revenue to least revenue. You can also list any new or current ones you want to emphasize. Are there any you want to stop? |
| 1. . Lease financing is the only service we provide 2. . 3. . 4. . 5. . 6. . 7. . 8. . 9. . 10. . |
| 11. How important are your prices to your customers? |
| Pricing is just important and quick, reliable, and straight forward service. |

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| 11. What is your business cycle? When is it busier or slower? Do you focus more on certain products/services at different times of the year? Is this consistently seasonal? |
| No seasonality |
| 12. What are the most common objections people have about using your products/service? |
| They've had poor experiences with other brokers |
| 13. What are the main challenges you face when trying to explain your product/service? |
| They don't understand how commercial lease financing works because they haven't done it |
| Target Market |
| 14. Do you have a defined USP (Unique Selling Point) or UVP (Unique Value Proposition)? What is it? |
| Direct contact with clientele. Answer our phones evenings and weekends. We're easy to get a hold of and try to work as hard as our clientele. |
| 15. Are you currently doing any marketing or lead generation activities, online or offline? What are the results? What ways have you found to be the most effective for promoting your business? Least effective? (Blogging, social media, referral programs, newsletters, workshops, Google advertising, pay-per-click etc.)? |
| Constant contact 2x per month. Some Facebook ads We'll start doing some social media posts with our new portfolio |
| 16. Do you have email list(s) of current and past clients? If yes, roughly how many addresses are there? |
| Around \$2000 |
| 17. Do you have a formal process for when leads come in? If yes, briefly, what is it? |
| We fill out a questionnaire and put them in our CRM |
| 18. Describe your target market, your ideal client, in as much detail as possible. |

Small businesses in Western Canada that use equipment to operate: Transportation, Construction, Agriculture, Manufacturing, Dental/Professional, Oil and Gas, Mining.

Civil construction on infrastructure and home building is our main target right now.

Competition

19. Competition: Who are your top competitors? What are their names and websites? What makes them your competitors? How do you rank against them? How do you measure this?

- <https://www.rbauktion.com/services/financial-services>
 - <https://uplend.ca/>
 - <https://www.leaselink.ca/>
 - <https://dynamiccapital.ca/>
- >RB Finance is our biggest competition. They have huge audience capture for their auction services and approach those clients for financing.

20. Why do people buy from you versus your competitors? Why should anyone choose to do business with you over your competition or doing nothing?

We are professional and accessible. Most leasing companies drop the ball a lot. Where we facilitate with very clear communication.

21. Do you have a guarantee or other risk-reversing offers? Does this include anything that your competition cannot, will not, or does not beat?

No guarantee but we do offer our services for free. We'll quote someone right away o.a.c. and we'll get them approved without obligation.

Graphics and Marketing Assets

22. Do you have a logo?

☐ Yes

Yes

23. If yes, do you like your logo? Or planning to change it?

☐ Yes

Leave the same

24. If not, do you need us to create a new logo?

☐ Yes

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| 25. What, if any, business cards, stationery, brochures, advertisements, etc. that use graphics, photos, colours, etc., do you want on the website? | |
| 26. Notable accreditations, certifications, or awards. From what organizations? | <input type="checkbox"/> Yes Members of the CFLA <input type="checkbox"/> No https://cfla-acfl.ca/ |
| 27. Meaningful testimonials or case studies from your most valuable clients. | <input type="checkbox"/> Yes <input type="checkbox"/> No Google reviews |
| 28. Do you give your customers information or literature in print or online? E.g.: Tips, how-to, qualifiers, etc. | <input type="checkbox"/> Yes <input type="checkbox"/> No No |
| 29. Frequently Asked Questions and Responses. | <input type="checkbox"/> Yes <input type="checkbox"/> No No |
| 30. Is there anything more you want us to know? | |