

CONSULTATION *Survey*

GENERAL INFORMATION



BUSINESS NAME:

CONTACT'S NAME:

ADDRESS:

PHONE NUMBER:

EMAIL:

SERVICE:

Answer questions targeted to your service needs.

- Why do you need a business consultant?
- Describe how you see us helping you:
- What is your company's mission?
- How do you define success? How do you measure success?
- What needs to happen for you to meet your goals?
- Why hasn't this happened already?
- What is your brand story?
- What is your budget?
- What are your expectations of us?
- How many years has your business been operational?
- What are your short term goals (1yr)?
- Describe your long term goals (5yrs):
- Indicate number of employees in your company:
- What are your financial goals?
- Do you want to build a new website or redesign an existing one?
- What makes your services unique?
- What features does your website need to be successful?
- Do you have your web content ready?
- What's the #1 goal of someone visiting your website?
- List 3 websites you like, preferably in different industries and include dot points what you do and don't like for each
- List out the pages/tabs you want on your website.
- To call your website a success, what would need to happen?
- Are you set up as cash basis or accrual basis?
- Do you have inventory? If yes, approximately how many inventory items do you stock?
- Do you need help with billing your customers? If yes, what is the estimated number of invoices to be billed per month?
- How do you usually receive customer payments?
- How many bills/expenses do you enter per month and what are the average payables per month?
- Do you need actual vs. budget Reports?
- How many hours do you spend on Bookkeeping per month?
- On a scale of 1 to 10, 1 being no bookkeeping experience and 10 being a bookkeeping expert, rate the skill level of your QuickBooks users.
- On a scale of 1 to 10, 1 being no bookkeeping experience and 10 being a bookkeeping expert, rate the skill level of your QuickBooks users.
- Are you behind on paying bills?
- Are you behind Billing your customers?
- How far back do you need your books to be cleaned up?
- When was the last reconciliation you performed?