



Now Plan This Business Questionnaire

Instructions: Complete this questionnaire to the best of your ability. Fax or email your responses to *All answers will be kept confidential by Now Plan This.* You can either print this document out and hand-write your responses, or edit this document directly in MS Word or other software. If you hand-write, and run out of room, attach any extra sheets to the end and make sure you label your continued responses.

Your Name: _____

Business Name: _____

Contact Info (include phone numbers and email address): _____

Description of Business in 50 words or less (main product or service or reason for business):

Business Organization type (eg. sole-proprietorship, LLC, S-Corp, etc): _____

years in business: _____

Date business started/incorporated: _____

Have you started a business plan? (If yes, please include when you return this questionnaire) _____

Are you seeking financing (bank loan, investors, etc)? _____

If so, describe the type and amount of financing you seek: _____

What industry is your business in: _____

Is your industry growing? (If so, describe why. Give reference sources.)

What are the major challenges facing your industry?

How do these challenges affect you?

List and describe each of your products and/or services. Include as much detail as possible.

Describe the pricing structure for your products and/or services:

Customer Information:

Who are your customers? (You may have one, or several types or groups of customers. List and describe them all)

What products or services do they buy from you (List for each type of customer listed in the previous question)?

Why do they buy from you (instead of a competitor)?

Competitor Information:

Who are your major competitors?

What sets you apart from your competitors?

What are your main strengths as an individual?

What are your company's main strengths?

What are your main weaknesses as an individual?

What are your company's main weaknesses?

What is/are your company's main goal(s) for the next year? Be as specific as possible. (If you're having trouble answering that question, then answer this one: Where do you see yourself in 1 year?)

What is your company's main goal(s) for the next 5 years? Be as specific as possible. (If you're having trouble answering that question, then answer this one: Where do you see yourself in 5 years?)

If you have past sales & expenses (historical financial information), please attach. _____
Financial information to include: 1) A balance sheet 2) An income statement 3) A cash flow budget 4)
Business tax returns for the last 3 years (if you are seeking financing)

Do you have any future estimated sales/expenses prepared? _____
If so, please attach. Financial information to include: 1) Projected cash flow budgets 2) Projected Profit
and Loss Statements 3) Start-up expenses (if you are just starting out)

How many people work for your company right now (including yourself): _____

Do you expect to hire employees over the next 1-2 years? If yes, list the positions you expect to fill.

Will any of these employees be in a management position (for these purposes, the definition of “management position” is anyone with the ability to affect how your company runs.)?

List these individuals who own or work for your company in a management position and include a short bio (one paragraph) about each. The bio should focus on their work experience or qualifications for this position:

Do you have an accountant that works with or for your business? (If yes, list their name and a brief summary of their business)

List any other consultants you have hired to help start your business:

Where is your business located? Give the address and describe the facility (if known). If a location, such as a retail space, is still TBD, list the requirements for the space.

Is location important to your business? If so, describe why and list the important factors in choosing your location.

List your key suppliers (if any):

Are you a member of any trade or professional organizations? List all and date you became a member.

Marketing, Advertising and Product Distribution:

List the ways potential customers find out about you:

How do you sell your product/service (i.e., retail, catalog, online, etc)?

Describe your web presence. Do you have a website? Do you advertise on the web?

Contingency Planning:

What kinds of changes can happen that would have a significant impact on your business? What would your response be to these changes?

Are there any governmental regulations that affect your business?

List 4-5, 1-hour blocks of time over the next week (after returning this questionnaire) that you would be available for a phone or face-to-face conversation (you may include early mornings, evenings and weekends)

After reviewing your answers, *Now Plan This* will contact you about meeting during one of the above times to discuss your business.