

Agenda for Phone Interview

Below are a list of topics and questions that your service consultant will discuss with you during the phone interview about your company. Please think about these topics in advance to prepare for your interview. If you are unsure, your consultant will explain to you what they are looking for.

- Why are you creating this plan?
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- Will you be seeking funding from the SBA? (If yes, please contact your local SBA Office to see whether you need three year or five year projections)
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- Mission
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- How is your company established? Are you an S Corp? C Corp? LLC? Sole Proprietorship?
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- What are all the services or products you offer, with as much detail as possible? For example, if you sell coffee, I would like to know what sizes, blends, flavors, styles, etc.
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- How much will each product or service sell for?
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- How much does it cost the company to provide the product or service (do not include salary or monthly expenses)?
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- Who will your customers be and how can you group them? For example: You customers will be residents of Orlando. You could then group them even further by age, family size, income, race, etc. These are the demographics of your customers.
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- Why have you chosen these people to be your customers?
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- How will you market your company? This involves how you let your customers know that you exist. Examples of marketing include an online website, listing your business in the phone book, handing out brochures, putting up flyers, mass mailings, etc.
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- What is your sales process? Will all sales be done through telemarketing on the phone? Will sales consist of giving a price quote and preview of services first? Will sales be completed in a retail store after the customer shops?

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- What is your competitive edge? Describe what makes your business different from others and why I should choose your business over a competitor.
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- Who is your competition?
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- Personnel. I need to know what duties each employee will be responsible for and how many employees you will have, including yourself. How much will each employee make, including you?
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- Management. Who will be running your business? What qualifications or experience do they have? Submitting a resume for all owners/management personnel will assist me to create a great plan for you.
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- What are your goals for the business?
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- What are the keys to success for your business? This could be such items as: location, knowledge, great service, etc.
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SWOT Analysis. This will allow you to potentially see where your business will have strengths and where it may have threats.

- Strength: Internal strengths of the business. Things you control and can change.

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Weakness: Internal weakness of the business. Things you can control and change.

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- Opportunity: External opportunities for business, these you do not control.

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- Threat: External threats, these you do not control.