

BUSINESS ANALYSIS QUESTIONNAIRE

Please complete this survey by selecting your most accurate response to each question. We will use this survey to focus on your most important concerns.

If you have a partner, each of you should complete the survey independently.

Thank you!

The Strebel Planning Group Team

PERSONAL INFORMATION

First & Last Name: _____

Address: _____

City _____ Zip: _____ Home Phone: _____

Email _____

BUSINESS INFORMATION

Business Name: _____

Business Address: _____

City _____ Zip: _____ Business Phone: _____

Email _____

BUSINESS ANALYSIS QUESTIONNAIRE: LEADERSHIP

1. I am so busy that I often lose sight of what's important to me.
 Agree Disagree Don't Know
2. I can't seem to find the right balance between my work, and my personal life.
 Agree Disagree Don't Know
3. I don't have a clear idea of what I want from my business.
 Agree Disagree Don't Know
4. My employees don't have a clear picture of what this business is all about.
 Agree Disagree Don't Know
5. My employees don't seem to care about their work the way I would like them to.
 Agree Disagree Don't Know
6. I don't know how to gauge whether my business is on the right track.
 Agree Disagree Don't Know
7. I am so busy fighting fires; I never seem to get anything done.
 Agree Disagree Don't Know
8. I don't know how to motivate others to do their best.
 Agree Disagree Don't Know
9. I don't feel like I am a true leader.
 Agree Disagree Don't Know
10. I don't feel like I am in control of how I spend my time.
 Agree Disagree Don't Know
11. I work too many hours.
 Agree Disagree Don't Know
12. Other concerns I have in the areas of leadership are:

BUSINESS ANALYSIS QUESTIONNAIRE: **MARKETING**

1. **My company doesn't do enough marketing.**

- Agree Disagree Don't Know

2. **I don't know what type of person is most likely to buy from my company.**

- Agree Disagree Don't Know

3. **I don't know what distinguishes us from our competitors.**

- Agree Disagree Don't Know

4. **I don't think that my potential customers know what distinguishes us from our competitors.**

- Agree Disagree Don't Know

5. **I don't think that our current customers know what distinguishes us from our competitors.**

- Agree Disagree Don't Know

6. **I don't think our marketing program is effective.**

- Agree Disagree Don't Know

7. **I don't know how to determine whether our marketing is effective.**

- Agree Disagree Don't Know

8. **We don't have a clearly defined company image.**

- Agree Disagree Don't Know

9. **Our marketing doesn't have a clear, consistent message.**

- Agree Disagree Don't Know

10. **I don't know how to, or think that we can't, use target marketing.**

- Agree Disagree Don't Know

11. **I don't know how to, or we don't, develop and use a marketing plan.**

- Agree Disagree Don't Know

12. **Other concerns I have in the area of Marketing are:**

BUSINESS ANALYSIS QUESTIONNAIRE: MONEY

1. I don't feel that I'm in control of my company's money.
 Agree Disagree Don't Know
2. I'm not satisfied with our company's financial record keeping.
 Agree Disagree Don't Know
3. I frequently don't have enough cash to meet current needs.
 Agree Disagree Don't Know
4. I don't know what my financial goals are.
 Agree Disagree Don't Know
5. I'm not sure where we stand in relation to our financial goals.
 Agree Disagree Don't Know
6. I don't receive regular financial statements.
 Agree Disagree Don't Know
7. I receive regular financial statements, but don't feel that I know what to look for.
 Agree Disagree Don't Know
8. I'm not achieving the profit margins I would like.
 Agree Disagree Don't Know
9. I don't know what profit margins are, or why they are important.
 Agree Disagree Don't Know
10. I don't know what my business is worth.
 Agree Disagree Don't Know
11. I don't know how to prepare or use a budget.
 Agree Disagree Don't Know
12. Other concerns I have in the area of Money are:

BUSINESS ANALYSIS QUESTIONNAIRE: MANAGEMENT

1. **My company is disorganized, work accountabilities and reporting relationships are not clear.**
 Agree Disagree Don't Know
2. **My employees rarely know what they should be doing. They need constant supervision.**
 Agree Disagree Don't Know
3. **My employees know what to do, but the quality of their work is far below what I would like.**
 Agree Disagree Don't Know
4. **I'd be in big trouble if certain key person(s) in my business were to leave.**
 Agree Disagree Don't Know
5. **I'm not able to find and keep good employees on a consistent basis.**
 Agree Disagree Don't Know
6. **Staff training is a big problem in my company.**
 Agree Disagree Don't Know
7. **Work never gets done the same way twice.**
 Agree Disagree Don't Know
8. **Employee problems take up too much of my time.**
 Agree Disagree Don't Know
9. **We don't know how to do, or don't take the time for, employee performance evaluations.**
 Agree Disagree Don't Know
10. **My managers don't know how to manage.**
 Agree Disagree Don't Know
11. **Employees frequently complain about their managers, and/or managers complain about their employees.**
 Agree Disagree Don't Know
12. **Other concerns I have in the area of Management are:**

BUSINESS ANALYSIS QUESTIONNAIRE: CLIENT FULFILLMENT

1. I don't now whether clients are satisfied or not.

- Agree Disagree Don't Know

2. I don't think the quality of our product/service is as high as it should be.

- Agree Disagree Don't Know

3. The quality of our product/service is inconsistent; sometimes it's very good and sometimes it's not.

- Agree Disagree Don't Know

4. I don't understand why our product/service quality is so inconsistent.

- Agree Disagree Don't Know

5. I don't know what our client retention rate is.

- Agree Disagree Don't Know

6. We lose too many clients for no good reason.

- Agree Disagree Don't Know

7. I often worry that we won't complete the client's job on time.

- Agree Disagree Don't Know

8. Capacity planning is a problem for me.

- Agree Disagree Don't Know

9. I don't know how to improve our client fulfillment systems.

- Agree Disagree Don't Know

10. We don't have any, or enough client fulfillment systems; things just seem to get done by individuals who "know" in their heads what to do.

- Agree Disagree Don't Know

11. We're constantly putting out fires.

- Agree Disagree Don't Know

12. Other concerns I have in the area of Client Fulfillment are:

BUSINESS ANALYSIS QUESTIONNAIRE: LEAD GENERATION

1. **Not having enough leads is a big problem for me.**
 Agree Disagree Don't Know
2. **I don't know if we're doing enough advertising.**
 Agree Disagree Don't Know
3. **I don't know how to evaluate the effectiveness of our advertising.**
 Agree Disagree Don't Know
4. **We spend too much on advertising and get too little return.**
 Agree Disagree Don't Know
5. **I don't know the best way for my company to generate leads.**
 Agree Disagree Don't Know
6. **I don't know where my best leads come from.**
 Agree Disagree Don't Know
7. **We don't know how to ask for, or get referrals.**
 Agree Disagree Don't Know
8. **I don't know what the best methods are for reaching the people I want to reach.**
 Agree Disagree Don't Know
9. **We don't have a large enough budget to generate leads effectively.**
 Agree Disagree Don't Know
10. **Lead generation is too complicated for a company like mine.**
 Agree Disagree Don't Know
11. **We don't know how to implement, or evaluate our lead generation activities.**
 Agree Disagree Don't Know
12. **Other concerns I have in the area of Lead Generation are:**

BUSINESS ANALYSIS QUESTIONNAIRE: LEAD CONVERSION

1. We're not making enough sales.

- Agree Disagree Don't Know

2. My salespeople are not able to generate predictable results each month.

- Agree Disagree Don't Know

3. I don't know how to sell our product/service as effectively as I would like.

- Agree Disagree Don't Know

4. I know how to sell our product/service, but nobody else in the company does.

- Agree Disagree Don't Know

5. I believe that you can't teach someone to be a good salesperson; you're either born with the ability, or you're not.

- Agree Disagree Don't Know

6. I don't know, or don't care, what our lead conversion rate is.

- Agree Disagree Don't Know

7. My salespeople all sell our product/service differently.

- Agree Disagree Don't Know

8. We don't know how to overcome objections.

- Agree Disagree Don't Know

9. I am not sure what I can do to increase sales from my existing customers.

- Agree Disagree Don't Know

10. I have no way to measure the effectiveness of our sales effort.

- Agree Disagree Don't Know

11. I don't know how to manage salespeople; I often don't know what they are doing.

- Agree Disagree Don't Know

12. Other concerns I have in the area of Lead Conversion are: