

## 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:**