



# Business Background Questionnaire

**Name:** \_\_\_\_\_

**Business Name:** \_\_\_\_\_

**Business Phone Number:** \_\_\_\_\_

**Fax Number:** \_\_\_\_\_

**Mobile Number:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

\_\_\_\_\_

**Email Address:** \_\_\_\_\_

\_\_\_\_\_

**Date:** \_\_\_\_\_

## **CONFIDENTIALITY NOTE**

The information contained within this questionnaire is confidential information, intended only for the use of **MBC-BIS** and the person completing this questionnaire. If the receiver of this questionnaire is not the intended recipient, the receiver is hereby notified that any dissemination, distribution, copy or publication of the questionnaire is strictly prohibited.

**Learn how to tap into the hidden opportunities within your business TODAY!**

## **Introduce Us To Your Business**

*To get started, we'd like you to tell us a little more about you and your business. The following questions have been designed to help us identify key profit building opportunities within your business.*

1. What type of business are you in?

- Professional Service
- Manufacturing
- Retail
- Wholesaler/Distributor
- Other \_\_\_\_\_

Please list the specific types of products and/or services you provide for your customers.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. How long have you been involved with / owned the business?

\_\_\_\_\_

# Business Background Questionnaire

3. Who, other than yourself, is involved in the decision making of your business?

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4. How many staff do you have?

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5. What were your goals when you started, or took over the business? Please be specific.

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6. Do you have a business plan or career plan?  Yes  No.

If yes, how often do you compare and measure your progress to the plan?

- I don't
- Monthly
- Quarterly
- Annually
- Other

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7. What has been your biggest professional accomplishment so far? What are you most proud of?

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8. Please describe the strengths you bring to this business.

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9. Please describe your main challenges. What holds you back? Be specific.

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10. What techniques and strategies do you regularly use to stay "on top of your game"?

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11. How many hours per week do you currently work on average? \_\_\_\_\_ How do you feel about this?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12. What are your hobbies? How do you currently spend time outside of your business?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. If you had enough time and financial resources to do anything you chose, how would you spend your time outside of your business?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

14. What revenues and profits has your business generated in the past 3 years and what do you project for the current year? If you do not have 3 years history, just include the years you do have.

Current year	_____ Revenue	_____ Profit
Last year	_____ Revenue	_____ Profit
2 years ago	_____ Revenue	_____ Profit
3 years ago	_____ Revenue	_____ Profit

15. How much income do you take home now? \_\_\_\_\_ How much would you like? \_\_\_\_\_

16. List the top 5-10 ways you generate leads today.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

17. What is your conversion ratio? What % of leads actually buy from you? \_\_\_\_\_

18. Is your conversion ratio estimated or measured?  Estimated  Measured

19. What is your average £ sale? \_\_\_\_\_

20. On average, how many transactions per year (or month, or week, etc..) does your average customer purchase from you?

\_\_\_\_\_ X per *week/month/year/other* \_\_\_\_\_



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21. How often do you stay in contact with your existing customers and what methods do you use?

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22. What sets you apart from your competition? What is the compelling reason someone would want to do business with you?

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23. What frustrations do your clients experience when dealing with your industry in general (e.g. trades-people showing up late or leaving a mess)?

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24. What parts of your business/profession do you enjoy MOST or find the most rewarding?

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25. What parts of your business/profession do you enjoy LEAST or find the least rewarding?

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26. Please check the box that describes you most of the time.

- I love my job. I can't wait to get up in the morning and go to the office.
- I enjoy what I do, but if I really had my choice, I'd rather do \_\_\_\_\_
- I can take it or leave it.
- I don't really like my job, but it pays the bills.
- I hate my job.

27. Describe your top 3 target market groups (e.g. businesses with more than 100 employees, OR - professionals age 25-40 with incomes between £25,000-£50,000, etc...)?

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

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28. How many employees, on average, have you employed in the past 3 years?

- \_\_\_\_\_ Currently  
 \_\_\_\_\_ 1 Year ago  
 \_\_\_\_\_ 2 Years ago

29. What team or staff challenges do you have in your business currently?

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30. On a scale of 1 to 10, please rate your skills (S) and interests (I) in the following key areas with 1 being the least possible and 10 being the highest.

Leadership	_____ S	_____ I
Marketing	_____ S	_____ I
Sales	_____ S	_____ I
Finance	_____ S	_____ I
Operations	_____ S	_____ I
Strategic Planning	_____ S	_____ I
Goal Setting	_____ S	_____ I
Customer Service	_____ S	_____ I
Decision Making	_____ S	_____ I
Employee Development	_____ S	_____ I

31. If there was one thing you could change about your business in the next 90 days what would it be and why?

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32. Do you feel that you are coach-able?  Yes  No

33. Please rank your frustrations from the choices below (1 biggest down to 11 smallest). If it's not a frustration for you, leave it blank.

- Not getting enough business 'in the door', or its spasmodic, so there's wasted productivity.
- We get lots of enquiries but so many don't turn into sales which is a waste of time and effort
- We have clients that buy once but we never see them again (except to complain).
- We're really busy, but there doesn't seem to be that much profitability.
- We're at war with competitors and 'price focussed' customers.
- I work the hardest in the business, but take the least amount of holidays.
- I need to constantly supervise my team and fix problems.
- I have to keep replacing my staff because they leave or have to be sacked.
- Our quality is impacted by others in our supply and/or delivery chain.
- I can't seem to find focus, motivation; I lack a 'Vision' for myself and the business.
- I'm just sick of the same routine; I get 'Mondayitis' every day.



## Business Background Questionnaire

34. In what way's do you feel you will benefit from having a business coach?

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35. Do you have any concerns or questions?

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**Congratulations and thanks for your time ...**

**Thank you for taking the time to complete this questionnaire ... it's really important for both of us to fully understand your current situation ... that way we can be sure to put our effort into the areas of your greatest importance.**

**PLEASE COMPLETE & EMAIL THIS FORM BACK TO US BEFORE  
OUR MEETING – THANK YOU**