



## Company Information

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

Please email back to [marsha@ownersview.com](mailto:marsha@ownersview.com) & bring it to your initial meeting. We will set a meeting time and date after receiving your company information. This helps us prepare for the meeting.

1. What is the name of the business? \_\_\_\_\_
2. How did you find out about the BSC? \_\_\_\_\_
3. What does this business sell? (If more than 3 products/services, list the primary ones only.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
4. Is this primarily an online, retail, service, or manufacturing business? \_\_\_\_\_  
\_\_\_\_\_
5. Who are your primary customers (resellers, value add providers, consumers, businesses, etc.)? Where are they located? \_\_\_\_\_  
\_\_\_\_\_
6. Is this a home-based business or do you have an office/store/manufacturing/outside site? \_\_\_\_\_
7. Do you have employees? How many? Who's responsible for sales, marketing, & financials? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
8. What is the overall goal of the business? Are you a startup? Expanding? Re-launch? Getting ready to sell? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
9. Are sales increasing or decreasing? What do you think sales will be in two years? Is that what you want? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. What are your major concerns, problems, opportunities about the sales and financial health of this business? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
11. What have you done to resolve these issues? How is that working? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Are you looking for help on a specific problem or opportunity or a mentor/guide to help you grow the business? Please describe. If neither of these is correct, please tell us what is your goal or problem. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Business Background Information

13. When was the business started (month & yr) and by whom? If you acquired it, how and when? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
14. What is the legal formation of the business? When did you set up this form? Why did you select that form? \_\_\_\_\_  
\_\_\_\_\_
15. How many owners are there? List all owners with more than a 20% ownership in the business. What are their primary responsibilities? \_\_\_\_\_  
\_\_\_\_\_
16. What are your primary responsibilities in the business? \_\_\_\_\_  
\_\_\_\_\_
17. What in your background, education, experience contributes to the success of this business? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
18. What were your gross sales for last year (year to date)? What were your profits after expenses? Did this include owner/operator wages and compensation? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
19. What bookkeeping system are you using? \_\_\_\_\_  
Version \_\_\_\_\_ Year \_\_\_\_\_ Do you have a business bank account established? Yes \_\_\_ No \_\_\_
20. Which is more important to you: creating an ongoing income stream or building a substantial transferable business with assets? \_\_\_\_\_
21. What specific things have you done to grow the business and/or sales? What has been the result? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
22. Do you have any of the following: a sale process, marketing plan, positioning statement? Which one (s)? If you have a positioning statement, please provide. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
23. What are prospects looking for when they search for products or services like yours? Are your prices above average, competitive, below average? How much is the average sales ticket? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
24. List up to three major competitors to your business and why.  
a. \_\_\_\_\_  
b. \_\_\_\_\_  
c. \_\_\_\_\_
25. Describe your present or initial target market (preferred or best customers). \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
26. What do you consider your unique advantage? \_\_\_\_\_  
\_\_\_\_\_