



Company Information

Date: _____

Please email back to 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? _____
