

# BUSINESS PERFORMANCE CHECK/ PRESENT POSITION QUESTIONNAIRE

Your name: \_\_\_\_\_ Date: \_\_\_\_\_

Name of your organisation \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Mobile: \_\_\_\_\_ Email: \_\_\_\_\_

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What is the nature of your business? \_\_\_\_\_

What is the annual revenue/turnover of your business? \_\_\_\_\_

What is your role in the business? \_\_\_\_\_

How many years have you been in this business? \_\_\_\_\_ What drew you to this business? \_\_\_\_\_

Who are the owners of the business? \_\_\_\_\_

How many owners are there? \_\_\_\_\_

Are there any passive owners or stakeholders? \_\_\_\_\_

Who is responsible for directing your business? \_\_\_\_\_

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Who are your direct competitors?

How do your competitors affect your business? \_\_\_\_\_

Are there enough clients and potential clients for everyone? \_\_\_\_\_

Broadly, what products or services do you offer? \_\_\_\_\_

Which products or services have the highest uptake from customers/clients? \_\_\_\_\_

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What are the most important things that potential customers/clients are looking for when considering the services that your business offers? \_\_\_\_\_

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Do customers/clients or potential customers/clients express any frustrations when dealing with your sector, and if so, what are they? \_\_\_\_\_

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Are your customers/clients value or price led? \_\_\_\_\_

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Do you have enough customers/clients? \_\_\_\_\_

Is your customer/client base growing, static or declining? \_\_\_\_\_

Have you noticed any changes in the profile of your customers/ clients over the last twelve months? \_\_\_\_\_

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How do you source new customers/clients? \_\_\_\_\_

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What is your most effective means of securing new customers/clients? \_\_\_\_\_

Who is responsible for looking for and securing new customers/clients? \_\_\_\_\_

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Do you have a proactive referral system in place? \_\_\_\_\_

By what means do you secure additional business from existing customers/clients? \_\_\_\_\_

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Do you maintain an up to date database? \_\_\_\_\_

How often do you contact your customers/clients? \_\_\_\_\_

Do you measure the average expenditure of your customers/clients? \_\_\_\_\_

Do you have any measures in place to increase the expenditure from your customers/clients? \_\_\_\_\_

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Do you have a backlog of work? \_\_\_\_\_

Does any work take longer than either you or your customers/clients would like it to take? \_\_\_\_\_

Does any work carried out for customers/clients need subsequent adjustment? \_\_\_\_\_

Are there any areas of the services you provide that experience bottlenecks? \_\_\_\_\_

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How many employees do you have ( excluding directors/owners/equity partners)? \_\_\_\_\_

Are there any gaps, for example, in terms of people with a particular expertise? \_\_\_\_\_

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Do you have any *managers*, other than owners/equity partners, in the business? \_\_\_\_\_

How easily do you recruit people? \_\_\_\_\_

Do you have a high staff turnover? \_\_\_\_\_ Is there a staff appraisal system in place? \_\_\_\_\_

Do you have any staff who are working towards qualifications? \_\_\_\_\_

How would you rate the competence of your staff? \_\_\_\_\_

How would you rate the productivity of your staff? \_\_\_\_\_

Are your staff reliable? \_\_\_\_\_ Do you have regular staff meetings? \_\_\_\_\_

Do you offer your staff training? \_\_\_\_\_

Do you work more or less hours than your staff? \_\_\_\_\_

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Do you own your premises, and if so, are these mortgaged? \_\_\_\_\_

Does the business have any short term borrowings? \_\_\_\_\_

Does the business have any long term borrowings? \_\_\_\_\_

Do you use any external advisors, and if so, what services do they provide the business with? \_\_\_\_\_

\_\_\_\_\_

How often is a detailed financial analysis of the business undertaken? \_\_\_\_\_

Do your customers/clients pay on time? \_\_\_\_\_

How much are you carrying in terms of outstanding debts? \_\_\_\_\_

What systems do you have in place to manage these? \_\_\_\_\_

Do you ever experience cash flow difficulties? \_\_\_\_\_

Has anything ever been done in an effort to optimise cash flow? \_\_\_\_\_

How many hours do you work in a typical week? \_\_\_\_\_ Are you happy working the hours that you do? \_\_\_\_\_

How many hours a week would you like to work? \_\_\_\_\_

If you equate your earnings on an hourly basis, do you earn more per hour than your employees? \_\_\_\_\_

Are you happy with the level of revenue the business secures? \_\_\_\_\_

Are you happy with your own level of income? \_\_\_\_\_

Do you feel that there is untapped potential in your business? \_\_\_\_\_

What steps have you in place to exploit this potential? \_\_\_\_\_

What are the major frustrations experienced in the business? \_\_\_\_\_

Do you have any concerns for the future of your business? \_\_\_\_\_

Do you have any plans for the future of the business? \_\_\_\_\_

Is there anything holding your business back? \_\_\_\_\_

Do the owners/directors/partners have any exit plans? \_\_\_\_\_

When did you last produce a business plan? \_\_\_\_\_

How many hours a week do you, fellow owners/directors/partners, spend on developing the business? \_\_\_\_\_

How many hours in a typical month do you spend on business education? \_\_\_\_\_

Have you ever worked with a business consultant? \_\_\_\_\_

Would you consider working with a business consultant to fast track the growth of your business? \_\_\_\_\_

*Thank you*