

# Your Business Health Check Questionnaire

**IMPORTANT NOTE:** Please complete all questions as fully and as honestly as you can.

Do please insert **"Don't know"** if you don't know an answer, as this also helps us understand what is happening -or otherwise - in your business at this time.

## LEGAL NOTICE AND CONFIDENTIALITY

The information contained within this questionnaire is confidential, intended only for the use of Back To Basics Business Solutions and the business named herein.

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.

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Your Name:			
Business Name:			
Email Address:			
Business Phone:		Business Fax:	
Mobile Number:	Website:		
Mailing Address:			
City:	Postcode:		
Date: (dd/mm/yy)	No. of Years Trading:	No. of Directors/Partners:	
Business Type:	Ltd Company:	Partnership:	Sole Proprietor:
Your Position in the Business:			

## 1: What is it you do?

1.1 What type of business are you in? (e.g. manufacturing, wholesaling, retail, professional service, etc).

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1.2 Please itemise the products/services that you provide for your customers/clients.

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1.3 Please describe your top target groups ( eg. Professionals, 25 – 35 year olds, general public)

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1.4 How many team members do you have in your business - other than yourself?

1.5 Please describe your biggest marketing frustration(s):

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1.6 Please list the main issues that your clients might have when dealing with your industry – not necessarily your business (eg. delay, value for money, understanding why you charge what you do, etc)

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1.7 What do you consider you do differently, and what makes you really stand out from your competitors?

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1.8 Would you describe yourself as:

a) Outgoing or Reserved?

b) People or Task orientated?

1.9 How many hours/week do you work?

How many would you like to work?

1.10 How much do you earn from the business?

How much would you like to earn?

1.11 What made you decide to get into this business in the first place?

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## 2: How do you generate new business?

2.1 (a) Please tell us how you generate leads for your business and how successful these strategies have been. Simply place a Score from 1-10 in the LH check box of the mediums you have used, with 10 being very successful and 1 being very unsuccessful.

(b) Also indicate the approximate % of your sales that's being generated by each strategy in the RH column.

Score (1-10)		Sales %	Score (1-10)		Sales %
<input type="checkbox"/>	Yellow Pages/Yell.com	<input type="checkbox"/> %	<input type="checkbox"/>	Magazines	<input type="checkbox"/> %
<input type="checkbox"/>	Metropolitan Newspaper	<input type="checkbox"/> %	<input type="checkbox"/>	Local Newspaper	<input type="checkbox"/> %
<input type="checkbox"/>	Television	<input type="checkbox"/> %	<input type="checkbox"/>	Web Site	<input type="checkbox"/> %
<input type="checkbox"/>	Referrals	<input type="checkbox"/> %	<input type="checkbox"/>	Direct Mailings	<input type="checkbox"/> %
<input type="checkbox"/>	Flyers	<input type="checkbox"/> %	<input type="checkbox"/>	Catalogues/Brochures	<input type="checkbox"/> %
<input type="checkbox"/>	Passing Trades	<input type="checkbox"/> %	<input type="checkbox"/>	Face to Face Calling	<input type="checkbox"/> %
<input type="checkbox"/>	Telephone Cold Calling	<input type="checkbox"/> %	<input type="checkbox"/>	Other Describe	<input type="checkbox"/> %

2.2 What is your annual Marketing Budget for generating inquiries?

How do you spend it?

2.3 Of the customers who've purchased from you, how many do you keep on a database?

2.4 Do you keep a list of customers (Yes/No)?

How do you use it?

2.5 How many of these customers would you class as active?

2.6 Do you keep a list of non-converted prospects? (Yes/No)?

If not, why?

2.7 Please describe how you generate most of your leads currently.

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2.8 How often would the average customer buy from you (Per Week / Month / Year) ?

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2.9 Out of every 100 leads, how many do you convert to customers?

Is this estimated or measured?

### 3: How do you look after your customers, Really?

3.1 Which of the following do you use consistently to keep in contact with your customers?

<input type="checkbox"/> Letters	<input type="checkbox"/> Calendars	Any other? (please describe)
<input type="checkbox"/> Newsletter	<input type="checkbox"/> Catalogues	<input type="text"/>
<input type="checkbox"/> Invoices	<input type="checkbox"/> Mobile/Texts	<input type="text"/>
<input type="checkbox"/> "Thank You" cards	<input type="checkbox"/> Web Site	<input type="text"/>

### 4: What is the average value of each sale (sales/number of invoices)?

4.1 What is your current average sale value?  Estimated or Measured?

4.2 Which products / services would be ideal to cross sell to your existing customers?

4.3 When was the last time you increased your prices?

Why?

4.4 How do you calculate your sell price for your products and services?

4.5 How do your prices compare to your competition ?

Cheaper  Same  Dearer  Why?

4.6 How does your quality compare to your competition?

Worse  Same  Better  Why?

### 5: How profitable are you?

5.1 What is your annual Turnover? Below \$150k  Below \$250k  Below \$500k  Below \$1M  Below \$3M  Over \$3M

5.2 What % growth/(fall) has your business had in the last year - why?

5.3 What % growth/(fall) in sales do you expect to see in the next year ?

5.4 Why? How do you see this being achieved/(avoided)?

5.5 How happy are you with your profitability and why? If not, what would you like it to be?

5.6 What was your pre-tax profit last Financial Year?  The year before?

## 6: How effectively do you plan and review?

6.1 Do you have long and short term goals that are written down and reviewed? (Yes/No)

6.2 If Yes, how often do you review them?

6.2 How do you review actual performance with what you planned, and how frequently?

6.3 What Key Performance Indicators (KPIs) do you use to monitor areas of performance?

6.4 How often do you prepare/review accounts?

6.5 How do you appraise staff performance, and how frequently?

## 7: Thinking ahead, what now are your top priorities?

7.1 In order to ensure that we cover the areas that are most important to you when we meet, simply number your Top Five priorities from the following list (Top =1)

<input type="text"/>	Having a strategy that will compel my former and inactive customers to come back.
<input type="text"/>	A marketing plan that will increase my turnover and profits, and free up my time to develop other areas.
<input type="text"/>	Having effective and inexpensive ways to generate more leads and prospects into my business.
<input type="text"/>	To develop effective sales appeal for my products/services that will place me well above the competition.
<input type="text"/>	Strong Yellow Pages and Newspaper advertising that encourages prospects to contact my business.
<input type="text"/>	To sell to companies that may have hard to reach decision makers.
<input type="text"/>	To use the telephone more profitably, by generating more sales from incoming and outgoing calls.
<input type="text"/>	To become a more effective consultant in my industry sector.
<input type="text"/>	To develop customer focused advertising copy that will draw willing customers, new and old, to my business.
<input type="text"/>	To have a systematic, sure fire way to get my customers to buy again and again.
<input type="text"/>	To find a simple way to hire the right people time after time.
<input type="text"/>	To build a unique referral system that will turn my customers into my best sales people.
<input type="text"/>	To create an irresistible direct mail campaign that will turn my mailbox into a profit centre.
<input type="text"/>	Inspiration, training and motivation for me and my team to install strategies that will get the business going.
<input type="text"/>	To have a great planning system that will give me and my team a real sense of purpose and direction
<input type="text"/>	Other (please specify) <input type="text"/>

## 8: Finally ...

8.1 What main priorities do you have for your sales and marketing in the next 90 days?

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8.2 What Sales and Marketing budget have you, or could you set-aside during the next 90 days to push forwards?

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8.3 If you had a single realistic wish for your business in the next 30 days, what would it be?

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8.4 What team/staff challenges do you have in your business at present?

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8.5 What goals did you have for yourself from the business when you started, and are they still the same?

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8.6 Who, other than you, is/are involved in deciding the strategic direction and future success of your business?

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8.7 Are there any other comments you would like to add, or questions you would like to ask at this stage?

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## Job Done ...

Thank you for taking the time to complete this questionnaire; it's really important for both of us to understand completely where you are with your business at this time.

One more step and we can now focus our expertise on those areas of most importance to YOU. Send the file by following the instructions below and then we'll arrange a free, confidential discussion with you.

If you want to save a copy of this form with the data you entered, press [ctrl] [p]. This will start a printer session. Select 'Save as PDF' or Select a PDF printer if you have one installed.

The send button will open an email message and attaché this file. Add any additional information or questions you feel important to the body of the email.

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