



CLIENT NEEDS ANALYSIS

PLEASE FILL IN YOUR ANSWERS

Company Name	
Date	

Financial Goals:



Where is the business now?			
Revenue	\$	Margin	%
Profit	\$	# Employees	
Number of hours the owner works in the business?			

Where do you want the business to go?			
Revenue	\$	Margin	%
Profit	\$	# Employees	
Number of hours the owner works in the business?			
Ideal time frame to achieve this forecast (years)			

Personal Shareholder Goals		
Wages, take home pay & stress	Now	Desired Future Level
Ever thought of selling/exiting the business?		
Ideal Exit Time Frame		

Pain Points



What are the pain points in your business?

What keeps you awake at night?

Pain Points	Priority	Impact	Financial Impact
What is the pain point?	Rate either; High, Medium High, Medium, Medium Low or Low		Potential financial improvement
1.			
2.			
3.			
4.			
5.			
6.			

High Priority Focus Areas

Which areas do you need to focus on now?

Business Strategy & Plans



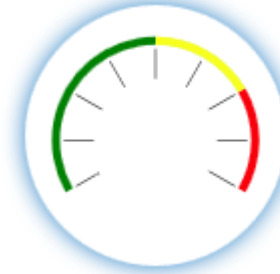
- High
- Medium High
- Medium
- Medium Low
- Low

Strategy Execution



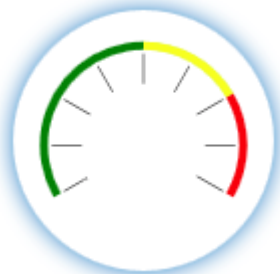
- High
- Medium High
- Medium
- Medium Low
- Low

Financial Health



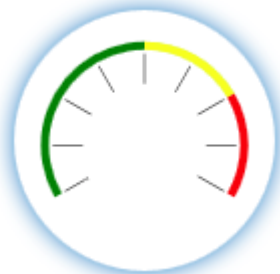
- High
- Medium High
- Medium
- Medium Low
- Low

Exit & Succession



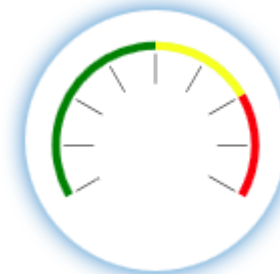
- High
- Medium High
- Medium
- Medium Low
- Low

People Issues



- High
- Medium High
- Medium
- Medium Low
- Low

Systems & Processes



- High
- Medium High
- Medium
- Medium Low
- Low

High Performance Business Quiz

Mark yourself 1-6, with 1= Not Good, 6= Good

If it is N/A then mark as 0

High Level Goals

Comments

1	Business Goals	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have your high-level business goals documented? Define where the business is now and where it will be over the next 3 years?	
2	Exit Goals	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have your high-level Exit and Succession planning goals documented with where you are and where you wish to be over the next 3 years?	
3	Personal Goals	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have your high-level Personal Goals documented? Where you are now and where you wish to be over the next 3 years?	
4	High Level Strategies	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Have you developed your high-level business strategies? Have you defined how your business stands out from the crowd?	

Strategic Goals

Comments

1	Customer Satisfaction	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Have you brainstormed with staff and customers to determine the 5 key things that determine whether your customers are happy?	
2	Success Factor Goals	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a documented list of 8-15 goals that will determine your business success? These goals should be financial and non-financial goals.	
3	Strategies & Actions linked to Goals	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a series of actions and strategies linked to these success factor goals?	

Milestones/ Actions

Comments

1	Milestones	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a list of annual milestones?	
2	90-Day Action Plan	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a 90-day action plan with key dates and accountability?	
3	Milestones Review	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you regularly review and follow up your milestones?	

Monthly Business Review

Comments

1	Goals	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you measure each month your achievement versus your target?	
2	Strategic Review	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a monthly scorecard and a formal process to review results?	
3	Milestones	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have milestones that are kept up to date?	

Systems & Workflow

Comments

1	Document Management	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a document management system?	
2	Accountability	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a reminder system of overdue tasks on projects?	

3	Policies	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have policies and procedures?	
4	Customer Service Issues	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you monitor and assess customer service issues	
5	Operational Issues	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Have you reviewed your liabilities in terms of health and safety and do you have documented procedures?	
6	Incident Register	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a safety incident register?	
7	Employee Liability Threats	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Have you reviewed your liabilities in terms of employee legislation and do you have documented procedures?	
8	CRM	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a CRM (customer management) system?	
9	Financial Forecast	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you regularly review budget forecasts and the financial health of your business?	
10	Accounts System	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a good accounting system that is being managed well?	

Employee Engagement

Comments

1	Weekly Staff Meetings	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a 'one on one' weekly staff meeting?	
2	Weekly Team Meetings	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a weekly team meeting?	

3	Staff Performance Standards	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Does each employee have KPI's, job descriptions and performance standards?	
4	Monthly Performance Review	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Does each employee report on their performance on a monthly basis?	
5	Annual Performance Review	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have an annual or 6 monthly performance review system in place?	
6	HR Policies	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you have a HR policies manual?	
7	Employee Contract	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do all employees sign an employee contract?	
8	Contractual Performance Standards	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Does your employee contract obligate your employee to abide by your performance system and high standards?	
9	Culture	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do you encourage a "high-performance" culture?	

Performance Culture

Comments

1	Define your culture	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Have you defined the cultural values of your business? Characteristics such as honesty, quality, friendliness and co-operation	
2	Management Support	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Do the managers and employees constantly reinforce the culture with their language and actions?	
3	System Reminders	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6	Are the systems being constantly reinforced and encouraged by management?	