

HIGH PERFORMANCE DISCOVERY QUESTIONNAIRE

OVERVIEW

Business Name and Structure: _____

Owner 1 Name: _____ Age: _____

Owner 2 Name: _____ Age: _____

Owner 3 Name: _____ Age: _____

Licensing or Regulatory Number: _____

Date Business Commenced: _____

Address:

Office Phone # _____

Key Contact Name: _____

Mobile # _____

Email Address: _____

Business Website: _____

Total Number of Staff: _____

Number of Business Owners: _____

YOU INC.

What do you want your business to look like?

What do you want your life to look like?

Your Top 5 Goals

- _____
- _____
- _____
- _____
- _____

Your Top 5 Challenges or Frustrations

- _____
- _____
- _____
- _____
- _____

Describe your relationship with the business and staff

What are your SWOTs?

	Strengths	Weaknesses	Opportunities	Threats
1.				
2.				
3.				
4.				
5.				

How much do you want to earn from the business?

\$ _____

STRATEGY

Describe your pitch in less than 160 characters (Elevator Pitch)

Why are you different?

How do you plan on growing your business in the future?

What will your business look like in 1, 3 and 5 years?

1 Year - _____

3 Years - _____

5 Years - _____

Do you operate in any niche markets? _____

Do you market yourself in any unique ways? _____

How is your business unique? _____

Is the delivery of your service different in any way? _____

■ Please supply any business planning materials you have in any form

How do you plan on growing your business?

MONEY

Growth and Financial Snapshot

Data Type	2020	2019 FY	2018 FY	2017 FY
Website Hits				
Staff #				
Enquiry #				
New Client #				
Total Clients				
Revenue				
Expenses				
EBIT	\$	\$	\$	\$
EBIT Ratio	%	%	%	%

Lines of Business (For Professional Services Firms Only)

Type	Revenue %	Revenue \$
Legal		
Financial Advice		
Accounting		
Insurance		
Mortgage Broking		
Other		
Total	100%	\$

How often do you access your financials? _____

Accounting system (Select one)

Xero MYOB Quickbooks Other: _____

Does your accountant give you any advice? _____

Are you happy with your accountant? _____

Are your business tax returns up to date? _____ Personal? _____

Do you have any business debt? _____ How much \$ _____

Are you saving or investing regularly? _____

Additional documentation required

- Please supply your last three years P&L
- Balance sheet
- Any forecasts you've created in any form available

PEOPLE

Staff Questions	Yes	No
Do you have an organisational chart?		
Do you have a procedures manual?		
Do you have written staff contracts?		
Do you have written staff job descriptions?		
Do you have a staff induction process?		
Do you have pre-prepared job ads?		
Do you know who your next hires will be?		
Do you regularly review your staff?		

Have you done staff off-site retreats?

Do you think your staff are satisfied?

Do you have any trouble keeping good staff?

Do you have high staff turnover?

Do your staff take many sick days?

Are your staff clear on their goals?

Are your staff clear on your business vision?

Do all of your staff match your culture?

Would your staff describe you as a leader?

Are you satisfied with your performance?

Key Staffing Description

Name	Position	Education/ Experience	Salary (Inc Super)

Total \$ _____

Contractors

Name	Position	Education/ Experience	Cost (Inc Super)

Total \$ _____

CLIENTS

Describe your ideal client (may be more than one type)

Describe your client value proposition

Do you have a written process for key procedures? _____

How many touch-points do your clients have each year? _____

Describe how and how often you communicate with clients

How do you use email or social media to communicate

What does your ideal communication model look like?

Have you done a client survey? _____

From 1-5, how satisfied do you think your clients are?

1 Being very unhappy, and 5 being extremely happy

1 2 3 4 5

What ranking would your staff give your client satisfaction?

1 2 3 4 5

CONVERSION (MARKETING & SALES)

Describe your fee structure

What other product or service areas could you offer?

Do you have a mechanism for driving new enquiries? _____

Do you have a method to qualify new clients? _____

Do you have a written first appointment process? _____

Do you use any client engagement software or unique process? _____

Which one/s? _____

How do you reward and look after your existing clients?

How do you use technology to promote your business?

Are you an expert in any particular area? _____

Have you ever featured in the media? _____

Describe your media experience

■ Please supply a copy of your brochure and any other printed material.

OPERATIONS

For each of the below, can you please give me an overview of the status of ownerships, leases, values, sizes, quantities, usage and needs.

Describe your compliance record and process

Describe your premises

Information and technology overview

Business management software

Assets and equipment

Printers/desks/computers/stationary

Thank you for completing the SAMHENDO.COM High Performance Discovery Questionnaire. If you have any questions, please do not hesitate to contact Sam on 0419 270 562 or sam@samhendo.com