

BUSINESS OWNER FACT SHEET



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1. How long have you owned your business?

2. Did you start or buy an existing business?
 - a. If purchased, who did you purchase from?

3. Do you or did you have any partners?
 - a. If yes, how many, what were/are their names, and what were the percentages?

 - b. How many of them are active in the business and, if any, what are their names?

 - c. Are any related? If yes, how?

4. How many employees do you have?

5. What is your estimated annual sales volume?

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6. What has been the trend in the last 3 years (up, down, or flat)?
 - a. If down or flat, was that by design?

7. In your opinion, what are your company's strengths?

8. What are your 5 biggest challenges, problems, and/or concerns?

9. What would you like to gain from the business analysis?



BUSINESS ALERT CHECKLIST

Company: _____

Job Number: _____

Name: _____

City/State: _____

Industry: _____

Title: _____ Date: _____

DEGREE OF URGENCY

CONCERNS	HIGH	MODERATE	LOW
1. SALES			
2. PROFITS			
3. QUALITY			
4. PRODUCTIVITY			
5. INVENTORY MANAGEMENT			
6. CASH FLOW			
7. COSTS AND EXPENSES			
8. EXECUTIVE ABILITY TO TAKE TIME OFF			
9. CREDIT AND COLLECTIONS			
10. HIRING PERSONNEL			
11. ABILITY TO COMPETE			
12. OTHER			