



Business Performance Snapshot

When completed, email to: neil.livingstone@cfoadvisory.com.au

Name:

Business Name and address:

Type of business:

How many years have you been in your business?

Email address:

Phone:

Existing website(s):

What is your approximate annual revenue?

What is your annual revenue goal?

Approximately, how many unique buyers do you have annually?

What is the average sale in your business? (That is, what is the average dollar amount that a typical buyer spends each time they buy from you?)

Approximately, how often does your average buyer purchase from you again?

Please tell me about your business:

Who are your clients? What do you do? What are you currently doing to grow your business?

What's the most important thing for you to accomplish in your business this year?

In addition to the above answer, what are three business goals you'd like to achieve in the next one to three years?

What are your biggest challenges, obstacles, barriers, and blocks to achieving this?

What are your current marketing strategies?

What kind of content do you currently have available (written, audio, and/or video)?

Are there any specific areas of help that you are looking for? (Examples include: marketing, sales, financial management, hiring, staff training, leadership development, etc.)

Anything else you'd like me to know?