# PaulHoytLogo 2013-06-26 Final

# \*\* Confidential \*\*

# Business Clarity Questionnaire

Thank you in advance for completing the questionnaire!

It is designed to help us understand where you are in the development of your business and where you would like to go in the next few months so we can recommend the products and services that will help you make progress as quickly and safely as possible.

### Instructions:

1. Delete this page and these instructions when you are done.
2. Replace <Your Business Name> with the (proposed) name of your business. If you do not have a name, then just make one up (e.g., “John Smith’s Coffee Shop”).
3. Complete the questions to the best of your ability. You are welcome to use some of the suggested language, or completely make up your own. You can also make up your own questions and answers if you like.
4. **Please note** that some of the questions are confidential. You may not want to send the completed documents to those who are not members of your inner circle.
5. If you don’t know the answer, then leave the question blank or type “I don’t know”. It is OK to leave some of the questions blank; we are just looking for your starting place.
6. Don’t worry about formatting or pictures. While this is not intended to be a polished marketing piece, please proofread and use your best efforts.
7. If you have a business plan, business summary, financial model, resume, or some other business planning documents, please send them to us along with the completed questionnaire. They will help us understand where you are today and where you want to go.
8. We’ll give you a call after reviewing the materials you provide to discuss next steps.

**Thanks! We look forward to helping you grow!**

<Your Business Name>

**Confidential Business Clarity Questionnaire**

Date: \_\_\_\_\_\_\_\_

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| **Fundamental Questions** | |
| Our Vision(How would you describe the business you are creating?) | ABC company is a leading provider of xxx in yyy. (YOUR vision statement, perhaps paraphrased). |
| **Our Products and Services**  (What are you selling?) | We provide xxxx products and services, and plan to produce xxx complementary products and services in the coming months and years |
| **Our Industry and Markets**  (Who are you selling to?) | Our market is ….. and has the following characteristics…. We anticipate gradually expanding through…. Over the next xxx years.  Our ideal customers are …… |
| **Our Value Propositions**  (How do you help you clients?) | Our products and services help our clients / customers …  We solve the \_\_\_\_\_\_\_\_\_\_\_\_ problem experienced by \_\_\_\_\_\_\_\_\_\_\_\_ By … |
| **Our Channels**  (How do you intend to get your products / services in the hands of your clients?) | We will sell directly to …  We will partner with \_\_\_\_\_\_\_\_\_\_ to reach \_\_\_\_\_\_\_\_\_  Our products will be on the shelves at \_\_\_\_\_\_\_\_\_  We will sell \_\_\_\_\_\_\_\_ online |
| **Our Service Strategy**  (How will you take care of your customers?) | We will serve our customers by ….  Our partners, \_\_\_\_\_\_\_\_\_\_\_, will provide service to our customers.  \_\_\_\_\_\_\_\_ will manage our customer service |
| **Our Critical Competencies**  (What do you really have to do well in order to achieve your goals?) | In order to create and deliver our products, we have to be great at ….. |
| **Our Team**  (Who is on your team?) | Our team currently consists of nnn people.  **John Doe** has xxx years experience in the xxx industry, and services in the role of …..  **Jane Doe** joined the team in August of this year, and serves in the role of …. |
| **Our Alliances and Partnerships**  (What companies are you partnering with?) | We have developed alliances with …  We are in the process of developing a partnership with … |
| **Our Genius**  (What do you do better than anyone else?) | Through our own team and are partners, we are really good at …..  We do ….. better than anyone else and anything else. |
| Our Long Term Goals(What would you like to accomplish in the next 5 years?) | In the next three to five years, we plan to have $nnn in annual revenues, yyy employees, zzz offices…  (Optional) We plan to sell our company for $nnnn |
| Our Progress(What have you done so far?) | We began in 20nn, and have made great progress each month, accomplishing…  We have nnnn customers to date, and are gaining customers at the rate of nnn per month |
| Our Plans for the Next Three to Six Months(What would you like to accomplish in the next phase of your growth?) | We anticipate completing our Strategic Plan, Financial Model, and Business Plan by xx/xx/07  We will open new offices…  We will hire xxx employees…  We will enjoy increasing revenues… |
| **Mindset Questions** | |
| Our Joy (What brings you the most satisfaction?) | I just love to…  I am happiest when I ….  If I could just do one thing the rest of my life it would be … |
| Our Challenges(What are your current problems?) | The biggest challenges we face right now include:   * We can’t find…. * We struggle with…. * We seem to always…. |
| **Our Blocks** (Do you know of any personal issues that are limiting your success?) | Sometimes I get stuck because …..  I am afraid to ….  It really bugs me that …  I am angry that ….  I worry that … |
| **Our Passion** (What does being successful mean to you?) | I need to succeed at this business because…  I am driven to help …  I am passionate about making this work because \_\_\_\_\_ is depending on me.  If I don’t succeed, then …. |
| **Advanced Questions** | |
| **Our Major Competitors**  (Who helps your target customers in ways similar to you?) | Our major competitors include:   * ABC company, who offers XXX (see [www.ABC.com](http://www.ABC.com)) * XYZ company, who offers YYY (see [www.XYZ.com](http://www.XYZ.com)) |
| **Our Intellectual Property**  (How are you protecting your company?) | We plan to / have filed trademarks for…  We plan to / have filed patent(s) for …. |
| **Our Request**  (What do you need right now?) | We are seeking members of our support team  We are seeking seed capital in the amount of $nnn,nnn  We are seeking customers |
| **Capital Questions (Optional)** | |
| **Our Current Offering**  (How much are you raising?) | We are raising $$$ through a promissory note / equity position, as defined in a separate document. |
| **Use of Proceeds**  (How do you plan to use the money you raise?) | We will use the seed capital as follows:   * $$$ for Working capital * $$$ for Product development * $$$ for Marketing * Etc. |