



1180 W. Main Street, Suite 2, Ripon, California 95366  
209.599.5051, email: cpa@vermeulencpa.com

# BUSINESS DEVELOPMENT POTENTIAL

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A PRELIMINARY ASSESSMENT TO DISCOVER  
HIDDEN POTENTIAL IN YOUR BUSINESS

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Your name

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Business name

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Address

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City/state

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Zip

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Phone (      )

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Fax (      )

---

E-mail address

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**Please return to:**

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Contact name

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Address

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City/state

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Zip

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Phone (       )

Fax (       )

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E-mail address

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**BUSINESS DEVELOPMENT POTENTIAL ASSESSMENT QUESTIONNAIRE**

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This questionnaire is designed to identify the potential for profit improvement in your business. It will also give us an indication of how we can help you achieve that. We will contact you after we have reviewed your responses and assessed your profit improvement potential. Thank you for taking the time to answer these questions.

1. What industry is your business in? \_\_\_\_\_

2. How many years have you been running this business? \_\_\_\_\_

3. How many years have you been involved in owning or managing any business? \_\_\_\_\_

4. Did you start this business or did you acquire it? started  acquired

5. Are you happy with the financial return you're getting from the business? yes  no

If you answered 'no', what return would you like to be getting? \_\_\_\_\_

6. On average, how many hours in a typical week do you spend working in your business? \_\_\_\_\_

7. How many hours would you like to spend working in your business? \_\_\_\_\_

8. What do you consider to be the biggest problems in your business? (Rank in order of importance from 1 to 16, where 1 = most critical problem and 16 = least critical problem.) Ignore it if it isn't applicable or a problem.

Lack of capital for expansion		Price competition	
Lack of sales		Lack of time to do what needs to be done	
Cash flow		Not enough customers	
Slow-paying customers		Supplier problems	
Lack of skilled people		Production problems	
Difficulty getting employees focused		Government regulations	
Difficulty hiring suitable employees		State of the economy	
Taxation		Other...(specify)	

9. If you had access to unlimited finance, what would you do to improve the business?

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10. What Key Performance Indicators do you use to monitor the progress of your business?

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11. Do you set targets as a reference point for managing your business?                      yes                       no

12. Do you have a business Action Plan that sets out precisely what you need to do to achieve your profit target?                      yes                       no

13. In the following list, check off those you involve in critical decision making in your business.

Board of directors	<input type="checkbox"/>	External business consultant(s)	<input type="checkbox"/>
Employed managers	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
Other employees	<input type="checkbox"/>	Friends	<input type="checkbox"/>
Your accountant	<input type="checkbox"/>	Other...(specify)	<input type="checkbox"/>
Your attorney	<input type="checkbox"/>		<input type="checkbox"/>

14. What was the main reason you went into business for yourself?

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15. Do you feel you are achieving this? If you answer 'no,' please explain why.                      yes                       no

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16. When we work with our clients on business development, our primary focus is to increase the value of our clients' business and, as a result, increase your net worth. As part of this process, we ask our clients to think into the future and imagine where they would like their business to be in 5 years.

(i) In 5 years, what is your target for:

	Target	Don't Know
Revenue		
Net profit		
Number of employees		
Number of employees now		

(ii) What is the value of your business now? \_\_\_\_\_ Don't know

(iii) What would you like your business to be worth in 5 years? \_\_\_\_\_ Don't know

(iv) Do you have a strategic plan to help you achieve that goal? yes  no

(v) How much money do you have invested or at risk in your business?

	Amount
Equity capital	
Loans to the business	
Value of personal property mortgaged to secure business loans	
<b>Total exposure</b>	

17. To help us to assess your profit improvement potential, please provide us with the following information.

(Note: If you do not know your exact average transaction value, an estimate is fine at this stage. Give a reasonable estimate by picking 20 sales invoices at random and calculating the average. If you feel comfortable that the result is about right, enter the value in the space provided below. If you're still unsure, select more invoices until you're confident that your estimate gives a fair indication of the true average.)

(i) What is your average transaction value? \_\_\_\_\_

(ii) Do you have a system to measure this or is it estimated? \_\_\_\_\_

(iii) How many times a year do your average customers buy from you?

Once a year		Once a week	
Once a quarter		Once a day	
Once a month		Other...(specify)	

(iv) How many active customers do you have? \_\_\_\_\_ Don't know

Do you have a system to measure this or is it estimated? \_\_\_\_\_

(v) So that we can complete a preliminary analysis of your financial performance, Attached   
please attach a copy of your past 2–3 years' financial statements.

Alternatively, please complete the following:

I do not wish to disclose my financial details at this time

Here is a summary of my results:

	20____	20____	20____
Total revenue			
Gross profit			
Total expenses			
Other income (expense)			
Net profit before tax			
OTHER INFORMATION:			
Number of employees			
Total salaries & wages			
Total interest charges			
Total depreciation			

18. Please use this space for any further comments.

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Please forward the completed questionnaire to our office by fax (209) 599.5052 or by email ([cpa@vermeulencpa.com](mailto:cpa@vermeulencpa.com)). Then contact our office to set up an initial consultation. We look forward to a distinctive association.

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