

Tisdale Marketing solutions LLC | Client Questionnaire: Business and Personal Assessment

- 1. Business Overview:** a. How would you describe the core purpose and values of your business?
b. Can you provide a brief history of your business, including its inception and major milestones?
- 2. Business Structure:** a. Is your business registered? If yes, what motivated you to register it? If not, what considerations led to that decision? b. Do you have a formal business plan in place, and how often do you revisit and update it?
- 3. Short-Term Goals:** a. What are your primary business objectives for the next 6 to 12 months? b. How do you measure success in achieving short-term goals?
- 4. Long-Term Vision:** a. Can you articulate your long-term vision for the business, say in the next 5 years? b. What steps are you taking to align your current actions with your long-term vision?
- 5. Strategic Approaches:** a. What strategies have been most effective for your business so far? b. Are there any challenges or roadblocks hindering the execution of your current strategies?
- 6. Competitive Landscape:** a. How do you differentiate your business from competitors in your industry? b. What market trends do you foresee impacting your business, and how do you plan to adapt?

7. **Brand Identity:** a. Does your business have a logo? If yes, how does it reflect your brand identity? If not, what considerations are involved in creating one?

8. **Clientele and Marketing:** a. Who is your target audience, and how do you tailor your products/services to meet their needs? b. What marketing channels have you found most effective in reaching your target audience?

9. **Financial Health:** a. How do you assess the financial health of your business, and what metrics do you prioritize? b. Are there any financial challenges or concerns you currently face?

10. **Team Dynamics:** a. How would you describe the culture within your team or organization? b. In what ways do you foster innovation and collaboration among your team members?

11. **Adaptability and Learning:** a. How do you stay updated on industry trends and innovations? b. Can you share an example of a situation where you had to adapt your business strategy due to unforeseen circumstances?

12. **Work-Life Balance:** a. How do you manage the balance between your personal life and the demands of running a business? b. What strategies or practices have you found effective in avoiding burnout?

13. **Technology Integration:** a. To what extent does your business leverage technology, and are there areas where you see potential for improvement? b. How do you stay informed about emerging technologies relevant to your industry?

14. **Customer Feedback and Improvement:** a. How do you collect and act upon customer feedback to enhance your products/services? b. Can you share an instance where customer feedback prompted a significant positive change in your business?

15. **Legacy and Impact:** a. What legacy do you hope to leave through your business, both personally and professionally? b. In what ways does your business contribute to your community or society at large?

Thank you for filling out this form. It will assist greatly in the creation and success of your project.

