

Client Intake Questionnaire – Tadela Consulting

Helping Businesses Run More Efficiently & Profitably

Thank you for your interest in Tadela Consulting. To provide tailored strategies that improve efficiency, profitability, and scalability, please complete the following questionnaire. Your responses will help us understand your business needs and identify key areas of improvement.

1. Business Information

- **Business Name:**
 - **Your Name & Role:**
 - **Industry:**
 - **Business Website (if applicable):**
 - **Business Location:**
 - **How long has your business been operating?**
 - Less than 1 year
 - 1-3 years
 - 4-7 years
 - 8+ years
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2. Business Challenges and Needs

- **What are your biggest business challenges?** *(Select all that apply)*
 - Declining revenue or inconsistent sales
 - High operating costs and inefficiencies
 - Lack of technology integration or automation
 - Difficulty scaling or expanding
 - Customer acquisition and retention issues
 - Compliance or regulatory concerns
 - Supply chain or vendor management issues
 - Other (please specify):
- **Which specific areas do you need assistance with?** *(Check all that apply)*
 - Financial analysis & cost optimization
 - Operational efficiency & workflow improvement
 - Strategic business growth planning
 - Technology implementation & automation
 - Business networking & strategic partnerships
 - Compliance & risk management
 - Other (please specify):

3. Financial & Performance Goals

- **What was your business's revenue last year?** (*Confidential & used for strategic assessment*)
 - Under \$100K
 - \$100K - \$500K
 - \$500K - \$1M
 - \$1M - \$5M
 - \$5M+
- **What are your financial goals for the next 12 months?** (*Select all that apply*)
 - Increase revenue by ___%
 - Reduce operational costs by ___%
 - Improve profit margins
 - Expand to new markets or customer segments
 - Secure funding or investment
 - Other (please specify):

4. Current Business Operations

- **How do you currently track business performance?**
 - We use detailed reports and analytics
 - We track some metrics but not consistently
 - We do not track performance data
- **Are you currently using business automation or AI tools?**
 - Yes, and they are effective
 - Yes, but we need better solutions
 - No, but we are interested in exploring options
 - No, and we prefer manual processes

5. Expectations & Collaboration

- **Have you worked with a business consultant before?**
 - Yes
 - No
 - **What results would define success in our collaboration?** (*Describe in a few sentences.*)
 - **Are there any specific concerns or areas of focus you would like to address first?**
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6. Next Steps

Would you like to schedule a free 10-minute consultation to discuss your needs?

- Yes, please contact me.
 - No, I would like more information first.
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Thank You

Your responses will help us tailor a strategy to improve your business. Our team will review your submission and follow up with the next steps.

For additional inquiries, contact us at: booking@tadelaconsulting.com

Visit us at: www.tadelaconsulting.com