

## Business Transitions Survey

Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** In each section, select the transitions that you are currently experiencing and those you are likely to experience in the future. In addition, check transitions in the short to mid-term and long-term columns that you either hope to experience or anticipate with concern.

<b>Business Structure/Development</b>		<b>Currently experiencing</b>	<b>Anticipate short to mid-term</b>	<b>Anticipate long-term</b>
1.	Start or purchase a business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Merge with another business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Move business to a new location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Open new branch of business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Gain and/or lose a business partner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Change or modify fees/pricing structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Expand/diversify revenue streams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.	Change of business focus/niche	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.	Restructure business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.	Obtain Business Valuation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.	Engage in succession planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.	Engage in Catastrophe planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13.	Sell or close business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14.	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Business Operations</b>		<b>Currently experiencing</b>	<b>Anticipate short to mid-term</b>	<b>Anticipate long-term</b>
15.	Hire consultant or coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16.	Outsource services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.	Implement new technologies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18.	Document processes and procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19.	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Practice Management/Human Capital

		Currently experiencing	Anticipate short to mid-term	Anticipate long-term
20.	Broaden business development team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21.	Build out support team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22.	Redefine roles/positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23.	Invest in technical education/skills training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24.	Invest in client relationship skills training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25.	Create internship program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26.	Modify employee benefits/salaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27.	Downsize/consolidate positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28.	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Marketing/Branding

		Currently experiencing	Anticipate short to mid-term	Anticipate long-term
29.	Hire marketing consultant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30.	Rebrand business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31.	Update website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32.	Engage in social media, blogging, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33.	Adopt new marketing strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34.	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Client Relationships/Community Outreach

		Currently experiencing	Anticipate short to mid-term	Anticipate long-term
35.	Improve client communication strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36.	Plan client appreciation or educational event	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37.	Engage in community event/volunteer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38.	Assess charitable giving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39.	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Career/Life Planning

Currently experiencing      Anticipate short to mid-term      Anticipate long-term

	Currently experiencing	Anticipate short to mid-term	Anticipate long-term
40. Improve work and life balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41. Pursue a new designation, license, advanced degree	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42. Downsize/simplify work life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
43. Plan a sabbatical/leave of absence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44. Retire or phase into retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45. Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Notes