



Maestro Assist

FRANCHISING & BUSSINESS
INCUBATION

MASTRO Assist – Client Needs Analysis Questionnaire

(To assess goals, ROI expectations, and KPIs for optimal service customization and cost-per-lead (CPL) efficiency.)

Section 1: Business Overview

1. **Company Name:** _____

2. **Industry:** _____

3. **Business Stage:**

- ☐ Startup (0–2 years)
- ☐ Growth (3–5 years)
- ☐ Established (5+ years)

4. **Number of Employees:** _____

5. **Annual Revenue (Est.):**

- ☐ < R500K
 - ☐ R500K – R2M
 - ☐ R2M – R10M
 - ☐ R10M+
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Section 2: Pain Points & Goals



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6. Top 3 Business Challenges:

- ☒ HR/Compliance (e.g., labor disputes, payroll errors)
- ☒ Marketing/Lead Generation (e.g., low brand awareness)
- ☒ Financial Management (e.g., cash flow, tax compliance)
- ☒ Operational Efficiency (e.g., lack of systems)
- ☒ Scaling/Growth (e.g., hiring, expansion)
- Other: _____

7. Primary Goal for Next 12 Months:

- ☒ Increase Revenue
- ☒ Reduce Costs
- ☒ Improve Compliance
- ☒ Scale Operations
- ☒ Enhance Brand Visibility

8. Desired ROI Timeline:

- ☒ Immediate (1–3 months)
- ☒ Short-Term (3–6 months)
- ☒ Long-Term (6–12 months)



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Section 3: Service-Specific Needs

A. HR & Compliance

9. Do you need:

- ☒ Employment Contracts
- ☒ CCMA/Dispute Support
- ☒ Payroll Management
- ☒ Training Programs

10. HR Staffing Status:

- ☒ No HR Team
- ☒ Part-Time HR
- ☒ Full-Time HR (but overwhelmed)

B. Marketing & Branding

11. Current Marketing Efforts:

- ☒ None
- ☒ Basic Social Media
- ☒ Paid Ads (Google/FB)



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- ☒ Full Marketing Team

12. Biggest Marketing Hurdle:

- ☒ Low Website Traffic
- ☒ Poor Lead Conversion
- ☒ No Clear Strategy

C. Financial & Legal

13. Tax/Compliance Status:

- ☒ Up-to-Date
- ☒ Behind on Filings
- ☒ Unsure

14. Do you need:

- ☒ Bookkeeping
- ☒ SARS Audit Support
- ☒ EME/BEE Certification

Section 4: KPIs & Success Metrics

15. How will you measure success? (Select 3–5)



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- ☐ Revenue Growth (%)
- ☐ Cost Savings (Rand value)
- ☐ Employee Retention Rate
- ☐ Lead Conversion Rate
- ☐ Website Traffic/Engagement
- ☐ Compliance Audit Pass Rate

16. **Target Cost-Per-Lead (CPL):** R_____ (if applicable)

Section 5: Budget & Commitment

17. Monthly Budget for Support Services:

- ☐ < R10K
- ☐ R10K – R25K
- ☐ R25K – R50K
- ☐ Custom: _____

18. Preferred Contract Length:

- ☐ Month-to-Month
- ☐ 6 Months



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- ☐ 12 Months

Next Steps

✓ MASTRO Assist will:

- Analyze your responses to tailor a **service package** (retainer or project-based).
- Define **KPIs** and a **90-day action plan**.
- Provide a **cost-benefit breakdown** (ROI projections).

Client Signature: _____

Date: _____