

BO HOLIDAY'S  
SMALL BUSINESS



VALUE • IMAGE • PRICE

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CONSULTING

3707 FM 1960 WEST STE 200-I HOUSTON, TEXAS 77068 713.292.7499

**PRE-POWER HOUR**

**SMALL BUSINESS PROFILE**

1. Name of Business - \_\_\_\_\_  
Name/s of Principals - \_\_\_\_\_  
\_\_\_\_\_
2. Core Business (products & services) - \_\_\_\_\_  
\_\_\_\_\_
3. Business Address - \_\_\_\_\_  
\_\_\_\_\_
- Billing Address *(if Same, leave blank)* - \_\_\_\_\_  
\_\_\_\_\_
- Contact number & email - \_\_\_\_\_
4. Business Type – \_\_\_Sole Proprietorship \_\_\_Gen/Ltd Partnership  
\_\_\_LLP/LLC Other - \_\_\_\_\_
5. Number of Employees: \_\_\_ Years/months in Business - \_\_\_\_\_  
Home based (Y/N): \_\_\_\_\_
6. Your 3 biggest competitors (for online competitors, write “o/l” next to name):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. Do you have repeat customers (Y/N): \_\_\_\_\_  
If YES, do they tend to buy the same items repeatedly? \_\_\_\_\_  
Do they return on certain days/times? \_\_\_\_\_  
What is the lifetime value of your average customer? \_\_\_\_\_
8. In a given month, what percentage of sales are first-timers v. repeat business: \_\_\_\_\_

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9. What is your broad goal?  
\_\_\_ Bigger Profits      \_\_\_ More Repeat Customers      \_\_\_ Both  
Other (specify) \_\_\_\_\_
10. What is your primary method of obtaining new customers?  
\_\_\_\_\_  
\_\_\_\_\_
11. What are your business' strong points? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
12. Weak points (areas you'd like to improve) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
13. What are your 3 most popular products/services?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
14. Your **POWER HOUR** date, time and [Jason's Deli](#) lunch menu selection:  
\_\_\_\_\_  
\_\_\_\_\_

NOTES:

Please bring a business card, your menu of services, and a sample pay receipt/invoice

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*Thank you in advance for your time, attention and candidness. Please review the **DEFINITIONS** and **TERMS** pages. After **POWER HOUR**, your formal business summary of the initiatives discussed will be sent to the email provided.*

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**PRE-POWER HOUR SMALL BUSINESS PROFILE**  
**DEFINITIONS**

BO HOLIDAY'S SMALL BUSINESS VIP CONSULTING – or BOMOTIVATION, VIP CONSULTING, POWER HOUR or PH.

**BUSINESS NAME** – Legally Registered business name (or dba) of VIP CONSULTING client.

**PRINCIPALS** – owners and partners as well as others who will be involved in implementing POWER HOUR initiatives and opportunities *and* can make legally binding business decisions (authorized to spend money, make payments, and sign contractual agreements).

**CORE BUSINESS** – the products and services for which your business was formed to legally sell.

**BUSINESS ADDRESS** – the address out of which the enterprise provides its CORE BUSINESS.

**BILLING ADDRESS** – the location where client receives US mail correspondence (bills, business regulatory information, offers, etc.).

**CONTACT NUMBER & EMAIL** – the preferred phone number and email address whereby PRINCIPALS desire to be reached.

**BUSINESS TYPE** – Client's legal business structure.

**NUMBER OF EMPLOYEES** – part/full/flex time payroll employees (number of team members)

**YEARS/MONTHS** – Total years and months in CORE BUSINESS

**HOME BASED** – CORE BUSINESS operated out of a residence

**YOUR 3 BIGGEST COMPETITORS** – The top 3 businesses known to you that provide (among other things) what your **CORE BUSINESS** provides (large or small, local or out of area, physical location or online)

**REPEAT CUSTOMER ANALYSIS** – What you basically know about your repeat customers buying habits

**CUSTOMER LIFETIME VALUE** – This is determined by: Average Customer Dollar Amount Purchase **X** Amount of Times They Purchase in a Year **X** 25 Years. This figure offers some perspective of the potential worth of a single loyal customer.

**FIRST-TIME and REPEAT BUSINESS** – Roughly, the percentage mix of first time customers and repeat customers over a given buying cycle (month, year).

**BROAD GOAL** – Whether you desire increased profits, increased customer loyalty, both or something else entirely.

**BUSINESS STRONG POINTS** – What you consider to be the things you and your team does very well.

**WEAK POINTS** – What you consider to be the things your team does that negatively impact customer loyalty and/or profits.

**MOST POPULAR PRODUCTS/SERVICES** – **CORE BUSINESS** offerings most commonly purchased by both **FIRST TIME** and **REPEAT CUSTOMERS**.

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## TERMS

### FOR PRE-POWER HOUR SMALL BUSINESS PROFILE

**BASIC - POWER HOUR (PH)** is a highly engaging, intensely focused 60 minutes business building strategy session with the goal of offering its clients numerous avenues and objectives for increasing customer loyalty and boosting profits. To maximize both the effectiveness of PH and the potential benefit to the client-business, the following conditions must be met (unmet conditions may result in reschedule or termination of PH session):

- **PRE-POWER HOUR SMALL BUSINESS PROFILE (PPH)** must be filled out as completely as possible and submitted 72 hours prior to scheduled PH.
- **PRINCIPALS** involved in strategy implementation should be present for PH.
- Interruptions during PH must be kept to a minimum.
- Recommended implementations must be enacted.

**GENERAL** – VIP CONSULTING may, at its sole discretion, decide that PH (based on the responses contained in the PPH, or any other purpose, reason or cause, whether fully revealed to the potential client-business or not) would not be compatible or a good fit, and choose not to engage the potential client-business further. In this event, any payments advanced by client-business will be returned within 7 business days and the potential client-business will be notified via email of such accordingly.

**PAYMENT** – unless otherwise noted (i.e., COMPLIMENTARY PH), the full \$197 for POWER HOUR must be paid at the end of the session. *This is a special introductory rate and will expire without notice.*

**RESCHEDULING** – VIP CONSULTING requires preparation prior to PH and therefore requests a 48 hour notice (by email or phone) if there arises in the client-business a need to reschedule. For prepaid client-businesses, notice received inside of the 48 hour window may result in forfeiture of some or all of any payments made (50% inside 48 hours, 75% inside 24 hours and 100% on the scheduled session date). In case PH

is rescheduled by VIP CONSULTING, client-business can accept new agreed-to appointment date or request a complete refund, whichever they desire. Refunds may take up to 7 days to post.

**SUMMARY REPORT** – Within 7 days, the client-business will receive a POWER HOUR PATH TO PROFITS REPORT, a summary of the various initiatives and opportunities noted during PH. Implementation of the various initiatives and opportunities are at the client-business' sole discretion, and VIP CONSULTING bears no responsibility, either expressed or implied, for any level of implementation.

**DISCLAIMER** – All business ventures and investments carry inherent risks, and the many different variables affecting small business success (herein defined as *increased profits* and *increased customer loyalty*) make it virtually impossible for any consultant, advisor or group to summarily guarantee any specific tangible or intangible return on the client's time and/or material investment. These variables include, but are not limited to, product demand (seasonal, location-dependent, etc.), client-business related factors (location, implementation of and adherence to initiatives and opportunities outlined, work team compliance and cohesion, etc.), shifts in customer demographics and business landscape, various socially (social media-driven backlash) or politically-driven shifts (regulatory changes), or economic/market forces (inflation, recession, fluctuations in material and delivery costs, etc.). Therefore, even after full implementation of initiatives and opportunities listed in the SUMMARY REPORT, VIP CONSULTING makes no claim whatsoever as to the level of success (if any) the client-business may experience, and therefore cannot be held accountable or liable (legally or otherwise), in any way, shape, manner or form, for any such success or the lack thereof.

**LUNCH** – PH sessions normally take place at the VIP CONSULTING business office (address is in the letterhead) and lunch from *Jason's Deli* is provided. Client may choose from the menu linked on page 2 of the SMALL BUSINESS PROFILE and write the selection on page 2 in the space provided.

**SATISFACTION GUARANTEE** – It is the goal of VIP CONSULTING to have delighted and satisfied client-businesses. If at any time within 30 days after POWER HOUR the client-business desires a refund, for any reason, VIP CONSULTING will refund the client the full amount paid, period. If we can't meet or exceed your expectations, then it's not right for us to have your money. And that's that. Just let us know by email please (bo@bomotivation.com). Thank you.