



Contact Information

Name _____ Company Name _____

Address _____ City _____ State ____ Zip _____

Phone _____ Email _____

Web Address _____ Years in Operation _____

About Your Business

What is your annual revenue goal?

How many locations do you have and where are they located?

Is your company growing or expanding?

If you are a nonprofit, what is your annual development revenue goal?

Describe your mission and values.

Describe some of the services you offer.

Describe your branding.

Outline your community outreach efforts.

Do you track your community efforts? Who is in charge of managing these relationships?

If you are a corporation, about how much do you give back to the community annually? _____

Do you want to grow your investment back to the community? Please explain.

What are your biggest frustrations and challenges you are facing in achieving your goals?

Do you have high staff turnover? Do you feel your employees are motivated?

What incentives do you provide employees?

What are the top (3) advantages of being a part of your company?

1. _____
2. _____
3. _____

What are your biggest weaknesses?

What would you say your staff would say needs to be changed?

How Can We Help You

What is your main motivation for reaching out to us?

What opportunities and challenges can we help you to solve with your strategy, building a plan, staffing, employee motivation, raising money, planning an event, etc.

What services would you need?

When would you like us to start? And for how long?

What is your budget for our monthly services?

Who would be our main point of contact?
