

Client Needs Questionnaire

Please help us understand what your business needs to be successful.
Fill out this form to the best of your knowledge.

How do you think we can help?

What is your idea of a good accountant or expect from him/her?

Area of your business:

Strong/Under Control

Can Be Improved

Weak/SOS

1. Bringing In Business			
2. Business Management			
3. Money Management			

If you already have an accountant: Firm Name: _____

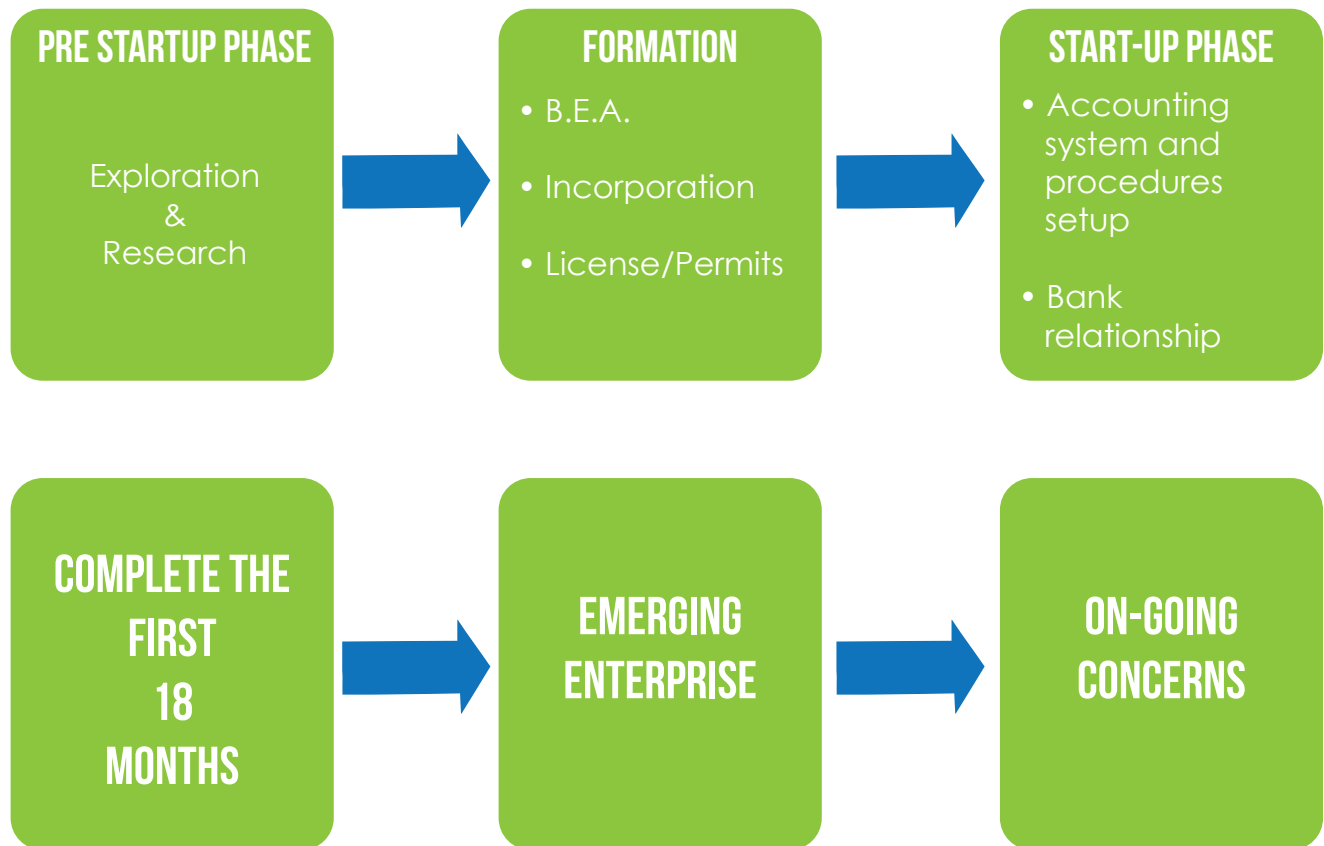
Contact Person Name: _____ Phone: _____ Ext. _____

- How often do you meet with your current accountant? _____
- Happy with services? _____
- Do you know all of your business needs? _____
- Do you think all of your needs are met with the current arrangement? _____
- What do you provide to your current accountant & PROCESS? _____
- What do you receive from your current accountant and FREQUENCY? _____
- How much do you pay to your current accountant? \$_____

Are you familiar with different types of Financial Reports or Financial Statements that a business owner needs? Please explain: _____

We Help You Save Money

Phases of the Business Cycle



Do you formally track customer satisfaction to determine if you meet or exceed your customer's expectations? _____

Do you know your Gross Margin and is it comparable to your industry peers?

Does your compensation system effectively encourage increased productivity, revenues and gross profit?
