

AIBEF Client Business Diagnostics *First Contact*

First Contact Report

CONFIDENTIAL

Report:
First Contact
Current Business Situation

- a) **Presentation**
- b) **Product**
- c) **Marketing**
- d) **Business Planning**
- e) **Financial Situation**
- f) **Production**
- g) **People**

Name: _____

Business: _____

Business Street Address: _____

_____ P/C _____

Business Phone: _____ **Email:** _____

Mobile: _____ **Web:** _____

Index No: _____ **(Office Allocation)**

BUSINESS HEALTH CHECK

This Tool is used to assist your Facilitator develop a beginning point for the Facilitation process. It provides both you and your Facilitator with some key questions to focus on and ideally, highlights major areas that will need most attention.

The Business Health Check is divided into 5 categories

- 1. Customer Awareness;**
- 2. Relationships and Networks;**
- 3. Competitiveness;**
- 4. Decision Making;**
- 5. Products and Services.**

These categories will be discussed with your Facilitator and form the basis of the initial contact with the AIBEF.

Please refer to next page (page 3) to commence questionnaire

About Your Business

How long have you been a business owner? Briefly outline your experience as a small business owner, both past and present.

If you could picture you and your current business in 5 year's time, what does it look like? What has it achieved and what is different to your actual position now?

1. Customer Awareness

(a) Where are your customers currently located?

Local area State-wide Australia wide International

(b) Do you want to change this mix?

Yes No

(c) Can you identify your 'typical' customer? (i.e. demographic in terms of age, geographical area, gender, affluence, buying behaviour.)

(d) Why do your customers choose to come to you rather than a competitor?

(e) Do you currently have a strategy to survey and gain information from your customers? Please give details.

(f) Do you have a plan to attract more customers? Please give details.

(g) Do you have a strategy to gain more sales from existing customers? Please give details.

(h) Do you have a strategy to bring back customers who are no longer coming to you?

(i) How do you use business technology to attract more customers?

Facilitator Comments – Customer Awareness

2. Relationships and Networks

(a) Who are your key business relationships with?

- Suppliers Key customers Stakeholders Competitors

(b) Do you feel that this is advantageous?

- Yes No

(c) Do you initiate interpersonal communication with clients to establish relationships? Please give details.

(d) What client relationship management strategies does the business use to develop long term partnerships? Please give details.

(e) Do you use client loyalty programs to attract and retain customers? Please give details.

(f) What strategies do you use to obtain feedback in order to maintain and improve ongoing relationships with clients? Please give details.

(g) Do you allocate time to establish and maintain business contacts? Please give details.

(h) What business networks do you actively participate in to support the business and enhance your personal knowledge of the market and industry? Please give details.

- (i) Which business technology do you use to help maintain and establish relationships and networks?

Facilitator Comments – Relationship and Networks

3. Competitiveness

- (a) On what basis does your business compete on?

Cost Quality Flexibility Speed

- (b) Do you feel using business technology to be competitive is advantageous?

Yes No

- (c) Do you have appropriate strategies in place to maintain and remain competitive in the marketplace? Please give details.

- (d) Do you use a management information system (MIS) to support decision making relative to competitiveness? Please give details.

- (e) How do you maintain your focus on remaining competitive? (products/services, process & technology, capacity & facilities, human resources, quality standards, operating systems) Please give details.

- (f) Do you have your competitive strategies written in a business plan? Please give details.

- (g) Do you feel you are competitive with own personal work performance or require your skills to be further developed? Please give details.

- (h) Is being competitive one of your personal work goals? Please give details.

Facilitator Comments – Competitiveness

4. Decision Making

- (a) Who makes the decisions within the business?
 Owner Manager/supervisor Work group Individual worker

- (b) Do you feel delegating decision making is advantageous?
 Yes No

- (c) What is the decision making process within the business? Please give details.

- (d) Do you use a management information system (MIS) to generate timely reports to assist in the decision making process? (Financial statements) Please give details.

- (e) Do you use a decision support system (DSS) to provide a range of decision options prior to making a decision? Please give details.

- (f) Do you seek opinions or feedback from others prior to making a decision? Please give details.

- (g) How do you approach problems or issues within the workplace? Please give details.

- (h) Do you think your personality influences your decision making capability? Please give details.

Facilitator Comments – Decision Making

5. Products and Services

- (a) Describe the products and services offered by your business? Please give details.

- (b) How do you keep your knowledge current on these products and services? Please give details.

- (c) How do you use business technology to promote your products and services?

- (d) When recommending products and services, where do you source your information from and what other factors do you also consider? Please give details.

- (e) When considering promotional activities what product and service information do you use to base your decision making on? Please give details.

- (f) What feedback do you collect on your promotional activities and how do you use it to plan your future activities? Please give details.

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- (g) How do you research market availability, industry trends, future innovations and competition standards, etc relative to your products and services? Please give details.

Facilitator Comments – Products and Services

END

Facilitator's Comments

a) Presentation

Strengths

In need of attention

b) Product

Strengths

In need of attention

c) Marketing

Strengths

In need of attention

d) Business Planning

Strengths

In need of attention

e) Financial Situation

Strengths

In need of attention

f) Production

Strengths

In need of attention

g) People

Strengths

In need of attention

Comments for Client: _____
