

Telephone Fact Find

Contact Name(s):

Date:

1. What are the biggest problems or challenges that you face in your business today?
OR: What areas of your business would you like to improve the most?
2. In general, are you pleased with where your business is today (no. of customers, turnover, profitability, growth)?
3. What methods do you use to get new business at the moment? How are they performing?
4. How long have you been in business? How did you get into this business?
5. What is your turnover/gross revenue? What is your profit margin/gross profit?
6. How many new business calls/leads from any source do you generate each month?
How many of them do you convert to sales?
7. How many times per year would an average customer buy from you? What would be the average value of each sale?
8. How many customers do you have on your database? a. Current b. Past

When did you last contact them?
What was the occasion?

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9. If you could wave a magic wand or sprinkle fairy dust, what would you like to see happen?
What would you like to achieve? What is your dream/objective?

10. How serious are you about solving your business problems or challenges? Just to clarify this for me: On a scale of 1 to 10, one being not at all and ten being absolutely right now, do or die, must fix this. Where would you be? _____ (If not 10, why not?)

11. Good, I think we should meet. Do you have a room where we will be undisturbed for approx one and a half hours without interruption or telephone calls?
Set date and time: _____

12. By the way, is there anyone else in the decision making process that you feel should be invited?
By that, I mean does anyone else need to okay this should you wish to go ahead?

OPTIONAL QUESTIONS:

- Just one other thing, if we get together on this would you have the budget to move ahead if you like it? In other words, if this makes sense to you, could you invest \$15,000 to \$25,000 over the next 3 months in order to implement this into your business? (If not; 'How much can you afford?)

- So that we understand one another, I'll be bringing some powerful resources to the table with a system and commitment to solve your business challenges. So let me ask you, and I say this so that we start off in the right way, what do you feel you bring? What would your commitment be?

Contact Name(s):

Company:

Address:

Telephone:

Mobile :

Fax:

Email:

Web:

Initial Appointment: Date:

Time:
