

Customer Assessment Form

Contact name: _____ Name of business: _____

Address: _____

Phone (main): _____ Phone (alternate): _____

Fax: _____ Email: _____

Web site : _____ Blog : _____

Type of Business (Please check one):

_____ Sole Proprietorship

_____ LLC

_____ Corporation

State of Incorporation: _____ (optional)

Years in Business: _____

Are you a decision maker? ___ Yes ___ No

What is your official title?

_____ President

_____ CEO

_____ CFO

_____ Principal

_____ BOD

_____ Other. Please explain: _____

What are the top three strategic priorities for your business? (Please check all that apply)

_____ Looking for a professional help to write a business plan to secure loan/venture funds

_____ Need help with generating a complete Marketing Plan

- Need help to improve cash flow/ increase sales
- Looking to hire right resources
- Looking for upper level manager (s)/ leader
- Looking to build a scalable sales team
- Need help with an outsourcing strategy
- Looking for strategic partners
- Looking for help to build sales channels/ partners
- Looking for help to create a unique brand
- Need help building International expansion strategy
- Need help with new product/ service launch
- Need help with conducting Market Research
- Need help with conducting online sales campaigns
- Other. Please explain _____

Do you have budget for this project?

- Yes.** We have fixed budget
- Yes.** We have just released a formal RFP (Request for Proposal) with details. Please email us a copy along with this form.
- No.** We are willing to discuss.

Please check if you know exactly what you are looking for:

- Business Plan
- Marketing Plan
- Strategy Plan
- Public Relations Strategy
- Product Placement in movies/ Media Buy-in

Please email this assessment form along with other relevant documents to

sales@theoc360.com

or call us at 877 466 2360