

Client name:

Website:

Telephone number:

Fax number:

Business name:

Email:

Mailing address:

Industry classification:

Retail	Association	Technology/telecom services
Food service	Healthcare services	Construction/maintenance
Agriculture/farming	Professional services <i>(Legal, accounting, consulting)</i>	Manufacturing
e-Commerce	Financial services	Other <i>(please describe in the space below)</i>
Not-for-profit	Business services <i>(Advertising, printing, etc.)</i>	

Please briefly describe your business or organization in 2 to 3 sentences.

Your role within the organization:

Owner/partner	Senior manager	Other
Employee	Advisor	

What kind of assistance do you need from Smith Business Consulting?

Start-up planning, feasibility, etc.	Growing the business	Solving a problem or challenge
Business planning	Market strategy and research	Promotion/advertising planning
Accounting, financial analysis	Operations management	Human resources management
Other		

How long have you been in operation?

0-1 year

1-3 years

More than 3 years

What are your short-term financial goals? (e.g. break-even, become profitable, achieve sales targets, etc.)

Briefly describe your 'typical' customer – or the customer you would like to attract.

Why do you think you need a consultant, and what results are you looking for?

Are there any specific deadlines or timelines we should be aware of?

How did you learn about Smith Business Consulting?

Word of mouth referral

Social media

Other

Google or other search engine

Is there anything else you think we should know?