



Client Name: _____

Business Name: _____

Business Owner(s): _____

Business Industry: _____

Cell Phone: _____

Phone: _____

Email: _____

How long have you been in the business? _____

Number of employees:: _____

Number of independent contractors: _____

GOALS

What are you hoping to achieve with this business overall? (In your industry, practice, society.)

What do you intend for this business to do for you personally?

What are some things you intend to learn from this?

What resources/instructions do you need to make it to the next level?

What are your expectations from Trydent?



S



W



O



T



S - Strengths:

A resource or capacity the organization can use effectively to achieve its objectives.

W - Weaknesses:

Areas in your business where you are not achieving in high levels or you may be underperforming compared to other businesses in your industry.

O - Opportunities:

Favorable external factors that could give an organization a competitive advantage.

T - Threats:

Anything that can negatively affect your business from the outside, such as supply-chain problems, shifts in market requirements, or a shortage of recruits.



TRYDENT ASSISTANCE

What has your average revenue been for the past 3 years? (estimate)

What is your current accounting system?

What would you like to improve or keep the same about your current accounting process?
(Pros & Cons list)

PROS

CONS

What information are you comfortable with providing to help Trydent assist with accounting? (Login credentials, copies of statements)

Are you comfortable with providing your last two tax returns?



What areas do you need assistance in the most? (Check all that apply)

- Bookkeeping
- Business Planning
- Tax Preparation
- Branding
- Financial Stewardship
- Training

INTRODUCTION

Mission Statement (brief)

Vision (brief)

BRANDING

What is your story?

What motivated you to start this business?

What is the tone you want to convey? (E.g. nurturing, helpful, uber professional, fun, witty)

What makes you stand out from other businesses/companies in your industry?



What are the values of your business? (list of adjectives) *exercise*

KNOWING YOUR AUDIENCE

Who is your “tribe”? (Target audience)

Why should they buy from you/need this product or service you’re providing?