



Business: _____

Owner(s): _____

Industry: _____

Meeting Date: _____

Next Meeting Date: _____

PART 1: MISSION/ VALUES

How have your actions and business decisions over the past year aligned with your mission?

What steps have you taken in your business over the past year to work towards your vision?

PART 2: CLIENTELE

What is the demographic of your clientele?

How has your clientele changed over the past year? (Growth/reduction)

How have you fostered the relationships with your clients to improve retention?

Have you gathered any client feedback on services/products?

If so, how have you used this information to improve your business? Or even keep the consistencies?



PART 3: GOALS

What are your goals for your business this year?

GROWTH/ SUSTAINABILITY:

What are you currently facing that could prevent you from reaching this goal?

Next steps (how can you bridge the gap from where you are now to where you want to be?)

FINANCIAL:

What are you currently facing that could prevent you from reaching this goal?

Next steps (how can you bridge the gap from where you are now to where you want to be?)

OTHER:

What are you currently facing that could prevent you from reaching this goal?

Next steps (how can you bridge the gap from where you are now to where you want to be?)



OTHER:

When is the last time you've worked on your strategic plan?

Any changes or updates you would like to make to that plan?

Business Plan Review

PART 4: BRANDING

How has your branding strategy changed or stayed the same since our last meeting?

Are your values still the same? If not, what has changed?

In what ways have you attempted to uphold those values? (Authenticity)

Over the past year, how have you branded yourself to stand out from others in your same industry? (Steps taken, missteps, ideas for future)



PART 5: PROJECTS

What projects are you currently working on?
(Include description)

How can Trydent assist you in completing these projects? (Resources)

PART 6: FINANCES

Where does the majority of your revenue come from? (Best selling product/service)

Percentage of total revenue from this product or service.

What is your biggest expense? Does this make sense for your business?

How much has your business made within the last fiscal year?

Q1: _____ Q2: _____ Q3: _____ Q4: _____

What is your projected trajectory of financial growth this year from last year? (What percentage of revenue have you already made compared to last year at this time?)

How could you improve processes or sales/gain more clients to boost revenue?



PART 7: CONSULTING NEEDS

Are you currently satisfied with the amount of contact from Trydent Consulting?

If not, what amount of contact would be most beneficial to you?

Bookkeeping Biannually Quarterly Monthly

What could Trydent Consulting do better for you as a client? (E.g. Provide more resources, expand or elaborate on services provided, have better communication)

What other resources that Trydent provides can help you improve your business?

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