



# BUSINESS DISCOVERY QUEST

Please complete and email to bizplan@brightwater.com.au or print and fax back to 07 3367 0974.

Start thinking about what you want from your business by completing this Business Discovery Quest. Simply answering the questions will be the start of your journey of Discovery into your business.

Once we receive this Quest, you will be sent a complimentary Management Skills Questionnaire (Valued at \$49.00). After you have returned the Questionnaire, a trained Business Adviser will call you to discuss the findings. It is from this perspective that you will begin to move toward having the business you desire.

Your business and personal information will be treated with the **utmost confidentiality**, used only by the Brightwater Team. It will not be provided to any third party.

## 1. PLEASE ENTER YOUR DETAILS BELOW:

Given Name\*: \_\_\_\_\_ Date of Birth: / / DD/MM/YY

Preferred Name: \_\_\_\_\_

Family Name\*: \_\_\_\_\_

Business Name\*: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ State \_\_\_\_\_ PC: \_\_\_\_\_

Mobile\*: \_\_\_\_\_ Fax: \_\_\_\_\_

Tel\*: \_\_\_\_\_

Email\*: \_\_\_\_\_

\*Mandatory

## 2. WHAT WOULD YOU LIKE FOR YOU AND FOR YOUR BUSINESS? (Select as many options as you like.)

- |                |   |   |   |
|----------------|---|---|---|
| Personal:      | <input type="checkbox"/> More money for me        | <input type="checkbox"/> Less stress                  | <input type="checkbox"/> More holiday time        |
| People:        | <input type="checkbox"/> Less headaches           | <input type="checkbox"/> Right people                 | <input type="checkbox"/> Happier people           |
| Money:         | <input type="checkbox"/> More profit              | <input type="checkbox"/> More sales                   | <input type="checkbox"/> Sales growth >20%        |
| Marketing:     | <input type="checkbox"/> More leads and enquiries | <input type="checkbox"/> Better conversion to sale    | <input type="checkbox"/> Increase average \$ sale |
| Support:       | <input type="checkbox"/> Help to manage better    | <input type="checkbox"/> Better financial information | <input type="checkbox"/> Legal risk minimisation  |
| Ultimate Goal: | <input type="checkbox"/> Sell the business        | <input type="checkbox"/> Multiply the business        | <input type="checkbox"/> Retire from business     |



3. WHAT IS THE ONE MAJOR CHALLENGE YOU FACE IN YOUR BUSINESS TODAY?

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4. FOR EACH QUESTION, PLEASE TICK ONE OPTION THAT BEST DESCRIBES YOUR PRESENT BUSINESS SITUATION:

1. How long have you been in business?

Just an idea       < 3 yrs       4 – 6 yrs       7 – 10 yrs       > 10 yrs

2. What are your estimated gross annual sales?

< \$250,000       \$250 – \$500K       \$500K – \$1M       \$1M – \$5M       > \$5M

3. How many people are employed in your business (including working owners)?

Just myself       < 5       5 – 10       11 – 20       > 20

4. Do you have a current documented business plan for your business?

No       Yes      If Yes, was it       Written by you?       Done with Consultant support?       Done for you?

5. If Yes to Q4, how long ago was it done?

This year       1 year ago       2 years ago       > 2 years ago

6. What type of business are you in?

Manufacturing       Wholesale       Retail       Service       Other

7. What does your business do?

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8. What is the Business Ownership Structure?

Sole Trader       Partnership       Private Company       Public Company       Number of partners/Owners

9. What is your role in your business? (multiple responses are acceptable)

Owner       Director       Manager (specify) \_\_\_\_\_       Other (specify) \_\_\_\_\_

5. YOUR MANAGEMENT SKILLS DIRECTLY AFFECT THE PERFORMANCE OF YOUR BUSINESS. (Please identify)

Management Structure:       Owner Manager       Management Team       Multi-Dept

Management Exposure:       None       Family Business       Corporation

Management Training:       None       Used a Coach       Tertiary \_\_\_\_\_

6. PLEASE TELL US HOW YOU FOUND OUT ABOUT THIS BUSINESS DEVELOPMENT OPPORTUNITY VIA THE BRIGHTWATER WEBSITE:

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Thank you for your enquiry. We will contact you soon.

THE BRIGHTWATER TEAM

Office Use: Date/Time Recd: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ : \_\_\_\_ Entered Date: 1. \_\_\_\_ 2. \_\_\_\_ 3. \_\_\_\_ 4. \_\_\_\_

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