**Organization Background**

|  |  |
| --- | --- |
| Organization Name: |  |
| Today’s Date: |  |
| Your Name: |  |
| Your Role: |  |
| Referred to IntelliVen By: |  |
| Owners: |  |
| Structure (circle one): | LLC  LL  S-Corp  C-Corp  Sole Proprietorship  501c3  501c4  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Year Founded: |  |
| Professional Investors: |  |
| Bank(s): |  |
| Size of Credit Line: |  |
| Do you do a monthly close: |  |
| Accountant: |  |
| Are Financials Professionally Reviewed or Audited Annually: | No  Reviewed  Audited |
| Prior Year Net Revenue: |  |
| Planned Current Year Revenue: |  |
| Year profitability achieved/targeted: |  |
| Number of W-2 Employees: |  |
| What Product or Service Does Your Organization Provide: |  |
| Who is your target customer market: |  |
| Why do customers purchase from you: |  |
| Do you have a financial plan: |  |
| If you have a financial plan, do you track actual financial performance against plan monthly: |  |
| Do you have a board of directors: |  |
| How often does your board meet: |  |
| Do you have a peer group with whom you meet monthly: |  |
| Do you have a personal coach: |  |
| If so, how often do you meet and for how long: |  |
| Which of the following constrain your organization’s growth? | * Ability to consistently deliver on customer commitments on time, on target, and on budget. * Sales * Capacity to deliver * Capacity to sell |
| Which of the following constrain your organization’s ability to operate? | * Governance * Plan-Do-Review cycle * Core Leadership Team alignment * Next generation of leaders’ development * Financing * Market development * Solution development |

**Please forward any of the following that are readily available:**

* Strategic Plan
* Schedule of regularly held operating meetings including sales meetings, account reviews, strategy reviews, annual off-sites, functional area reviews, solution reviews, etc.
* Chart that shows who in your organization you count on for what.
* Management summary used to introduce the organization to potential investors/donors.

**In advance of our call or visit please:**

* Skim, and consider subscribing to, the IntelliVen blog at: [www.intelliven.com](http://www.intelliven.com) or following us @intelliven
* Consider purchasing: [*Manage to Lead: Seven Truths to Help You Change the World*](http://www.intelliven.com/manage-to-lead/).

**Please enter below anything else you want us to know ahead of our call/visit.**