

## 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?	<ul style="list-style-type: none"> <li>• Ability to consistently deliver on customer commitments on time, on target, and on budget.</li> <li>• Sales</li> <li>• Capacity to deliver</li> <li>• Capacity to sell</li> </ul>
Which of the following constrain your organization's ability to operate?	<ul style="list-style-type: none"> <li>• Governance</li> <li>• Plan-Do-Review cycle</li> <li>• Core Leadership Team alignment</li> <li>• Next generation of leaders' development</li> <li>• Financing</li> <li>• Market development</li> <li>• Solution development</li> </ul>

**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.\*](#)



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

