

## Client Assessment Form

Please provide the following information and answer the questions below.  
**The information provided is protected and confidential.**

### GENERAL INFORMATION

**Business Name:**

**Owner(s) Name:**

**Business Address:**

**Telephone Number:** Business:  Personal:

**Business Email:**

**Business Start Date:**

**Type of Business:**  Sole Proprietor  Partnership  Corporation  Non-Profit  Other

**Business Status:**  New/Start-up  Existing

**No. of Employees:**

**MSME Recipient:**  Yes  No

**Govt. Grant Recipient:**  Yes  No

### BUSINESS SUPPORT SERVICES

**What business support services do you require? Select all that apply:**

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Website Design         | <input type="checkbox"/> Marketing Plan          | <input type="checkbox"/> Business Plan Preparation |
| <input type="checkbox"/> Logo Design            | <input type="checkbox"/> Social Media Marketing  | <input type="checkbox"/> Business Advisory         |
| <input type="checkbox"/> Package & Label Design | <input type="checkbox"/> Local/Export Marketing  | <input type="checkbox"/> Training Programme        |
| <input type="checkbox"/> Flyers/Brochures       | <input type="checkbox"/> Advertising & Promotion | <input type="checkbox"/> Administrative Services   |
| <input type="checkbox"/> Business Cards         | <input type="checkbox"/> Architectural Design    | <input type="checkbox"/> Meeting Rooms             |
| <input type="checkbox"/> Printing               | <input type="checkbox"/> Feasibility Study       | <input type="checkbox"/> Business Management       |
| <input type="checkbox"/> Photography            | <input type="checkbox"/> Bookkeeping Support     | <input type="checkbox"/> Inventory Management      |
| <input type="checkbox"/> Videography            | <input type="checkbox"/> Financial Statements    | <input type="checkbox"/> Production Management     |
| <input type="checkbox"/> Dronography            | <input type="checkbox"/> Financial Coaching      | <input type="checkbox"/> Regional/Int'l Tradeshow  |
| <input type="checkbox"/> Graphic Design         | <input type="checkbox"/> Accounting Software     | <input type="checkbox"/> Legal Services            |
| <input type="checkbox"/> Uniforms               | <input type="checkbox"/> Quality Control         | <input type="checkbox"/> Other:                    |

# TRAINING & BUSINESS DEVELOPMENT

Select **all** training that would be beneficial to your business.

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Recordkeeping       | <input type="checkbox"/> Business Plan      | <input type="checkbox"/> Inventory Management      |
| <input type="checkbox"/> Marketing           | <input type="checkbox"/> Financial Planning | <input type="checkbox"/> Disaster Planning         |
| <input type="checkbox"/> Market Research     | <input type="checkbox"/> Copyright          | <input type="checkbox"/> QuickBooks                |
| <input type="checkbox"/> Accounting          | <input type="checkbox"/> Customer Service   | <input type="checkbox"/> Human Resource Management |
| <input type="checkbox"/> Security Management | <input type="checkbox"/> Legal Requirements | <input type="checkbox"/> Banking Requirements      |
| <input type="checkbox"/> Microsoft Excel     | <input type="checkbox"/> Public Speaking    | <input type="checkbox"/> Negotiation               |

Other, please specify:

What is your vision for your business?

What challenges are you facing in implementing your vision?

How do you prefer to receive business support?

- Online
- One-on-one (e.g. Business Advisor)
- Thematic support (e.g. conferences/events/workshops/webinars)
- Continued support (e.g. business mentoring)
- Other (please specify)

What activities are you most likely to participate in? Select all that apply.

- Focus groups
- Online training
- Survey/Questionnaires
- Local, regional and international trade shows
- Conferences, seminars, workshops

What is your preferred time to attend training workshops?

- Mornings
- Afternoons
- Evenings