

Business Solution Division / Virtual Needs Assessment:

The following is intended to be a quick run-through for you to see in what areas you may need some help and support. We don't offer all the services the survey will ask you about, but if not, we can certainly refer to someone! I've broken down the various aspects of a small business into categories. With the exception of the first 6 questions, each category asks for you to answer a yes or no question and to provide an average of the hours in a week that you spend with each activity. Exact numbers are not necessary, a basic idea of where your time is spent (or not spent) is all that we are after. Note especially items that need to be handled (but are not!), or you wish you had the time for. To complete, just read through, or print out this assessment, writing down answers or notes for the areas that pertain to you. Later, we'll schedule a time to talk about your answers, or you can send me an email listing the most pertinent needs.

The To-Do List

- 1) Think about all of the things on your To-Do list. What are the 5 tasks that you never seem to get done?
- 2) Out of those 5, which 2 tasks have you (or do you) postponed the longest?
- 3) Thinking about your To-Do list, what is the most crucial thing that you simply do not have time to do?
- 4) What part of your daily (or weekly) routine do you absolutely hate the most?
- 5) What about your business would you never do if given the choice?
- 6) Which two items do you love to do?

Website Maintenance:

- 1) Aside from website design, do you maintain or update your website on a regular basis?
 - a. Average of _____ hours spent updating your website
- 2) Do you use an autoresponder service? Which one?
- 3) Do you use an online shopping cart system (eCommerce, eCart)? Which one?

Social Networking:

- 1) Which social networks do you have an account with? (i.e. Twitter, Facebook, LinkedIn, MySpace)
- 2) Of these, which are you currently *active* on?
- 3) Do you use them for your business?
- 4) Have they been successful?
- 5) Do you feel confused over which are successful and which are not?
- 6) Do you wish you had more time or guidance?

Marketing:

- 1) Do you have a system that you use to capture email addresses? Y / N / I need one
- 2) Do you collect business cards, attendance lists, and other documents that you use for capturing emails? Y/N
 - a. Average of _____ hours per day/week typing contact information into a database or email program
- 3) Do you publish articles and blog entries on the web? Is there a back-link to your website?
 - a. Average of _____ hours per day blogging, copying and pasting article copy into website
- 4) Do you send out news/press releases?

Customer Service/Sales:

- 1) Do you receive emails that frequently ask the same questions over and over?
- 2) Do you have templates in place for answering these frequently asked questions?
 - a. Average of _____ hours per week spent replying to the same questions over and over

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General Reporting:

- 1) Does your business require that you compile spreadsheets or databases to collect information for easy retrieval? Y/N
 - a. Average of _____ hours entering information into spreadsheets/databases

SEO:

- 1) Have you ever run a website grader? (The Hubspot SEO website grader is free and available at <http://website.grader.com/>)
- 2) What is your score?
- 3) Have you ever done any web search-engine-optimization (SEO) for your website?
- 4) Do you currently use any methods to drive traffic to your website? (pay-per-click, Adwords, social networks, etc)?
- 5) Do you monitor your traffic? How?

Tradeshaw and Networking Follow-up Strategies:

- 1) Do you attend tradeshow events? Which? How often?
- 2) Do you belong to any networking groups? Which? How often?
- 2) Do you find that you have a lot of phone calls after the events asking for your services?
- 3) Average of _____ hours conducting follow up either by email or phone calls.
- 4) Do you need to conduct more follow up but are either unsure how to or have no time?

Desktop Publishing and Layout Projects:

- 1) Are there marketing pieces you haven't had time to create? Which?
- 2) Do you have new projects that require layout/graphic design?

Bookkeeping and Payroll:

- 1) Is your bookkeeping getting done? Y/N
- 2) Are you doing it? Or outsourcing it?
- 3) Do you save receipts and claim deductions? Y/N
- 4) Do you send out your own invoicing? Y/N
 - a. Average of _____ hours per week sending out invoices
- 5) Do you save paid invoices and track income? Y/N
 - a. Average of _____ hours per week entering income into a report
- 6) Do you handle your own Sales Tax reports and returns? Y/N
- 7) Do you run the reports needed at tax time? Y/N
- 8) Are you keeping up with your payroll (if any) quarterly reports?
KMS doesn't offer bookkeeping; you will be referred to The Right Choice Bookkeepers.
KMS doesn't offer payroll services; you will be referred to California Payroll.

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Just in case:

Research Projects and Ghostwriting:

- 1) Average of ____ hours per week/month writing articles for online or print publications including e-zines, blogs, and news releases.
- 2) Average of ____ hours per week/month researching statistics/medical/university studies for speeches, articles, or professional journals.
- 3) Average of ____ hours per week conducting other research as specified:

Direct Mail Advertising:

- 1) Have you ever taken the time to truly define your target market? Y/N
- 2) Is your target market one that is likely to respond well to direct mail? Y/N
- 3) If you currently use direct mail advertising, average of hours per week/month that you spend collecting addresses, typing up labels and stamping post cards: _____

Speaking Engagements & Radio Guest Spots:

- 1) Do you speak to groups? Y/N (chamber mixers, network groups, associations, other)
 - a. Average # of times you speak per month
- 2) When speaking to groups, do you present materials backed up by statistical reports, published articles, popular subjects, or topics relative to current events?
 - a. Average of ____ hours per week spent researching articles, news stories, and statistical reports for data
- 4) Do you use the same copy for each speaking engagement, altering a few words or phrases to fit the context of your audience? Y/N
 - a. Average of _____ hours per week revising previously used materials
- 5) Do you use Power Point presentations? Y/N
 - a. Average of _____ hours per week revising presentation