

S. W. O. T. ANALYSIS

STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS ANALYSIS

Customer Ref #: _____

Date: _____

PERSONAL PARTICULARS

Name: _____

Tel BH: _____

Address: _____

Tel AH: _____

Mobile: _____

Email: _____

Spouse's Name: _____

Age: _____

Marital Status: _____

No. of Dependents: _____

Other: _____

Health: Good Fair Poor Ages: _____

BUSINESS REQUIRED

Types of

BUSINESS PREFERRED: _____

Area: _____

Option 1: _____

Area: _____

Option 2: _____

Area: _____

Option 3: _____

Area: _____

Price range: _____

Time Frame: _____

Intended Outlay: _____

Amount to be Financed: _____

Other Details: _____

BROKERS COMMENTS

BUSINESS EXPERIENCE

1. What skill have you acquired that you believe will ensure the successful operation of the business?

(Please tick the appropriate boxes and rate skill level from 1 to 5.)

- | | |
|-----------------------------|-------------------|
| • Management | Rating: 1 2 3 4 5 |
| • Book Keeping / Accounting | Rating: 1 2 3 4 5 |
| • Computing | Rating: 1 2 3 4 5 |
| • Marketing / Selling | Rating: 1 2 3 4 5 |
| • Planning / Organization | Rating: 1 2 3 4 5 |
| • Communication | Rating: 1 2 3 4 5 |
| • People Skills | Rating: 1 2 3 4 5 |
| • _____ | Rating: 1 2 3 4 5 |
| • _____ | Rating: 1 2 3 4 5 |

2. Why do you want to go into business?

- Unhappy with current employment
- Financial Gains
- Redundancy / Retrenchment Payout
- Like being your own boss
- Have the capital now
- Other _____

3. Are you prepared to undertake the risks involved in operating a business?

Eg. Will you mortgage your home if necessary?

Do you have knowledge of the type of business you wish to enter?

Are you aware of the responsibilities you have in relation to staff?

Other relevant questions _____

4. Do you have an eye for detail?

Eg. If an employee was skimming money from the business would you be likely to detect it? How would you handle the situation ?

- Are you able to make quick assessments of situation?
- Are you able to assess people well?
- Are you able to assess products or services that may be offered to you?
- Do you have the ability to successfully interview and appoint staff?
- Other questions _____
- _____

5. Is your main concern developing / building a name for yourself and be known by your clientele for running a quality business or are your main concerns based on collecting the takings?

6. What are your plans about expansion of any business. Do you want the business to keep gaining / expanding (eg. More outlets, diversify products / services, expand floor spaces, open longer hours, etc) OR are you satisfied with achieving a predetermined size (and corresponding return) and just maintaining that level?

Notes- _____

7. How much of your existing assets are you willing to put up to acquire the business?

Notes- _____

AND

How much of your existing property / assets base are you willing to divest to purchase the right business?

Notes- _____

8. In the initial stages of the business do you see yourself being able to work a:
70 hour and above week
50 hour week
40 and below hour week
Play a management role and leave the hard work to employees
Other- _____

9. Other Relevant Questions-

EMPLOYMENT BACKGROUND

10. Summarize briefly your employment history

Ideally we want to know the type of company, the duration of employment, positions held, skills acquired, relevance to the business purchase, remuneration if possible)

11. How do you like your current job, and its effect on your lifestyle, earnings, family, etc?

Notes- _____

12. Do you feel comfortable managing people, do you have any people management experience?

Notes- _____

13. Other Relevant Questions

FAMILY COMMITMENTS

14. Are you married or currently living with someone?

Notes - _____

15. Is your wife / partner currently employed?

Notes - _____

16. Do you have children, if so how many and what ages?

Notes - _____

17. How much do you require to support the family weekly (or monthly, etc)? _____

What income level do you desire from the business to support your family?

Notes - _____

18. Does the family support the idea of you going into business? - Yes / No

Notes - _____

19. Is your partner behind you business plans (Is your wife pushing you in to going into Business or is it your idea)?

Notes - _____

20. Is the family willing to re-locate if the business required it? - Yes / No

Notes - _____

21. What level of commitment would you be willing to give to the business?

High

Medium

Low

22. Other relevant questions –

