

# JOHN C. STEWART

Consultant to the Quick Printing Industry

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## CONFIDENTIAL CONSULTING QUESTIONNAIRE

Today's Date \_\_\_\_\_

Date of Proposed  
Consulting Visit \_\_\_\_\_

Consulting Fee \_\_\_\_\_

Deposit \_\_\_\_\_

Balance Due \_\_\_\_\_

Email Address \_\_\_\_\_

### I. GENERAL BACKGROUND INFORMATION

1. Name of business \_\_\_\_\_ # of locations? \_\_\_\_\_

Your Name \_\_\_\_\_ Phone \_\_\_\_\_

Business Address \_\_\_\_\_ Fax# \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Year Business was started? \_\_\_\_\_ Did You start it?  Yes  No

If answer to the last question is "No," when did you purchase it? \_\_\_\_\_

2. Approximate number of square feet in the locations reported above? \_\_\_\_\_

3. Please list gross sales for the following years: (If Available)

2000 \_\_\_\_\_ 2003 \_\_\_\_\_ 2006 \_\_\_\_\_

2001 \_\_\_\_\_ 2004 \_\_\_\_\_ 2007 \_\_\_\_\_

2002 \_\_\_\_\_ 2005 \_\_\_\_\_ 2008 (Proj'd) \_\_\_\_\_

4. Please provide an estimate of exactly how much you withdrew  
or paid yourself in salary in your last full fiscal year? \$ \_\_\_\_\_

5. Does the above figure include payments made to your spouse?  Yes  No

6. If your spouse is paid separately, what is his/her salary? \$ \_\_\_\_\_

7. How often do you receive or prepare financial statements?

Monthly  Every Six Months  Other \_\_\_\_\_

Quarterly  Annually

8. Have you prepared a Forecast & Budget for the current years? (If yes, please include a copy with your  
information packet.)  Yes  No

9. Do you feel "comfortable" in analyzing and understanding your financial statements (Profit & Loss and  
Balance sheets)?  Yes  No

10. What is your "current ratio" as found on your balance sheet? \_\_\_\_\_

**II. GENERAL MANAGEMENT**

1. How often do you provide/give raises to employees? \_\_\_\_\_
2. What is the average percent of raises given last year? \_\_\_\_\_
3. Total number of employees — Please calculate the total number of employees (including yourself and spouse) required to produce the sales generated in your last full fiscal year. Be sure to include part time employees in your calculation. (i.e. three part time employees each working approximately 20 hours each would total 1.5 employees. A full time employee who consistently works 50 hours would consequently equal 1.25 employees)? \_\_\_\_\_
4. Do you currently utilize any type of systematic bonus or incentive system for one or more of your employees?  Yes  No

If Yes, please explain to whom these bonuses are paid and how it is calculated? (a simple summary is sufficient at this point.)

\_\_\_\_\_  
\_\_\_\_\_

5. If you were to total together the net profit of your corporation before taxes, your annual salary (exclude your spouse/partner) and a reasonable allocation for special company fringes what would that total be as a percent of sales for you last complete fiscal year? \_\_\_\_\_%

**III. COMPUTERIZATION & PRICING**

1. Are you currently using a computer?  Yes  No
2. If Yes, what do you use it for? \_\_\_\_\_  
\_\_\_\_\_
3. What is the primary method you use for calculating prices and providing printing estimates?  
\_\_\_\_\_
4. If you currently use a computer program or computer price book, which one do you use?  
\_\_\_\_\_
5. When was the last time you raised the majority of your prices? \_\_\_\_\_
6. By what percent were these prices raised? \_\_\_\_\_
7. Please list your price for the following items:

1000	3-part NCR Forms , black ink, one side	\$ _____
500	#10/24 Regular Envelopes	\$ _____
1000	Camera-ready, 24# Classic Laid Letterheads in Black ink	\$ _____
1000	Flyers, camera-ready, black ink, on 20# White 1-S	\$ _____
1	Your all-inclusive charge for a standard colored ink wash-up	\$ _____

**IV. MARKETING AND ADVERTISING**

1. Please list the approximate amount spent annually on the following:

Your Yellow Page Ad \$ \_\_\_\_\_ (Size of ad \_\_\_\_\_)  
Direct Mail \$ \_\_\_\_\_  
TV & Radio \$ \_\_\_\_\_  
Misc. \$ \_\_\_\_\_

2. How often do you send/distribute direct mail or other promotional material to clients and prospects?

Monthly                       Quarterly                       Other (explain)  
 Bimonthly                       Every Six Months                      \_\_\_\_\_

3. Do you currently maintain mailing lists of the following:

Customers?  Yes  No      How Many? \_\_\_\_\_  
Prospects?  Yes  No      How Many? \_\_\_\_\_

4. How are these lists prepared?

On Computer?       Purchased?       Manually typed?       Other?

5. Do you currently employ an outside sales representative?  Yes  No

If "Yes," please provide your best estimate as to how much in additional sales is generated by this individual? \_\_\_\_\_

Please describe briefly their compensation package: \_\_\_\_\_

6. Do you or your spouse make regular outside sales calls?  Yes  No

7. What is the most unique or unusual advertising or marketing idea implemented in the past year?

\_\_\_\_\_

**V. GOALS AND CHALLENGES**

1. What segment of your operation are you most pleased with in regards to efficiency and profits?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. What segment or segments of your operation causes you the most headaches or problems?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Please list, as specifically as possible, the three most important goals you would like to achieve in the next six months as a result of the proposed consulting visit?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## ADDITIONAL ITEMS OR INFORMATION REQUESTED

At your earliest convenience, and at least four days prior to the visit, I would appreciate receiving, along with the completed questionnaire, copies of as many of the following items as possible. The items requested do not have to be "dressed up." They can be handwritten, Xeroxed, etc. Please, nothing fancy! Please rest assured that all information provided is treated at all times in strict confidence, and are not shared with any other individual.

- 1. A complete list of all owners, spouses, partners and employees, full or part time, including the average number of hours worked by each, as well as a brief job description (one or two words will do) and their current salary or hourly rate.
- 2. Copies of financial statements for at least the past three years, if available, as well as current financials. (Please do not substitute tax returns in lieu of financials).
- 3. A xerox copy of your current Yellow Page ad as well as copies of any other recent promotional pieces you have distributed to customers and prospects.
- 4. Copies of any special price lists you use for special services such as typesetting, bindery and high-speed copying.
- 5. Copies of any other pricing data that you may be currently using such as hourly rates, press speeds, etc.
- 6. Copies of any current production forms used for tracking production in either typesetting or the press room.
- 7. A brief list of major pieces of equipment used in your production facility - Typesetting/ Camera/Press/Bindery Departments.
- 8. A random sampling of jobs (exclude copying jobs) processed through your shop in the past two weeks.

Please do not spend a lot of time on the above requested information. If it is not available, then skip the item and provide those items you do have available.

**PLEASE RETURN THIS COMPLETED QUESTIONNAIRE, ALONG WITH THE OTHER REQUESTED INFORMATION AND YOUR DEPOSIT CHECK, AS SOON AS POSSIBLE, TO THE ADDRESS LISTED BELOW.**

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