
BUSINESS ADVISORY SERVICES

FORMS

BAS017 SME Needs' Analysis Questionnaire

Name of Business: _____

Date: _____

Comments

1. Current Business Performance

- 1.1 How is business going?
Are you happy with current performance? Yes ☐ No ☐
What are your key business concerns?

- 1.2 Business analysis and interpretation of financial results including trends. Are you happy with the results?

- Department Sales Yes ☐ No ☐
- Gross Profit % Yes ☐ No ☐
- Stock Levels Yes ☐ No ☐
- Stock Turnover Yes ☐ No ☐
- Team Productivity Yes ☐ No ☐
- Benchmarking Yes ☐ No ☐

- 1.3 Are there any particular reviews you would like us to undertake? Yes ☐ No ☐

- "Peer Comparison" (ESS BIZTOOLS' Business Partner - benchmarking.com) Yes ☐ No ☐
- Australian Taxation Office Yes ☐ No ☐

- 1.4 Ratio analysis on the following:

- Profit & Loss Account - are you receiving Profit & Loss Accounts for each business activity? Yes ☐ No ☐
- Balance Sheet Yes ☐ No ☐
- Source and Application of Funds Yes ☐ No ☐
- Key Performance Indicators (KPIs) - have these been established for each business activity? Yes ☐ No ☐

- 1.5 Debtors' Management Policies:

- Debtors' Aged Analysis Yes ☐ No ☐
- Debtors' Management Yes ☐ No ☐
- Have you written off bad debts? Yes ☐ No ☐
- If yes, how much has been written off in the last twelve months? \$
- Debtors' Days Outstanding Calculated Yes ☐ No ☐
- Debtors' Finance/Factoring Yes ☐ No ☐