

General

What is the focus / niche of your business?

- Handyman
- Remodel
- New Construction
- Etc.

What differentiates you from your competition?

What is the typical size project - \$, timeframe.

What are the last 5 projects you worked on?

How long have you been in the business?

How many employees?

How did you start?

- Part time
- Cold Turkey
- Worked in industry

What was your previous career?

What is your educational background?

What is your business structure – sole proprietorship, LLC, corporation etc.?

Sales

How do you generate sales leads

Advertising? – Methods, how much do you spend on it?

- Lettered truck
- Web
- Newspaper
- Radio
- Yellow pages
- Other
- Word of mouth (customers)
- Professional referrals?

Do you offer free estimates?

What is your conversion ratio – estimates/jobs?

How are your contracts structured?

- Time & Material – Rate? Material markup?
- Firm Fixed (Allowances?)

Range

What is your “coverage area” – how far do you travel for projects?

How busy are you?

Hours spend on projects

Hours spent generating sales leads

Hours spend accounting etc.

What times of the year are busy? Slow?

What is your backlog?

Any projects you refuse / refer to others?

Financial

Are you meeting your financial expectations?

How long after starting you business before you met your financial expectations?

Are you willing to share gross revenue and or profit / salary information? In broad terms?

How much capital have you invested in your business (tools vehicles etc.)?

Professional / Insurance

What licenses do you hold?

What professional organizations are you a member of?

What professional services do you use – attorney, accountant etc.

What insurance do you carry? Cost?

Equipment etc

How do you transport your equipment to the location?

Truck(s)?

Trailer(s)?

Is it working well for you?

Do you typically deliver your own material or have the supplier drop it off?

Do you own or lease the vehicle?

Do you have a personal vehicle in addition?

What tool can't you live without?

What tool surprised you how useful it is?

Personal

Is your health better/worse since starting your business?

How is your work/life balance?

Do you feel stressed?

Do you get to your "Honey Do" list at home (would your spouse agree?)

Technology / Green building

Software used? – estimating? accounting?

Other technology?

How is your business capitalizing on "green building" technologies / processes?

Growth

Do you have a business plan / or 5 year plan?

What is your outlook on the economy / future of your business (growth rate)?

Continuing education / continuous improvement activities?

What has been your greatest success?

What has been your greatest failure?

How do you feel your business compares to your peers?

Do you know anyone in the business that failed? Why?

If you did it again, what would you change?

Any related books you recommend?

Any other resources (web sites etc.) you recommend?

Do you have a mentor?

Wrap up

Is there anyone else you know who I should talk with? – Will you introduce me?

Would you be willing to review & comment on my business plan?