DELTAPOINT
PARTNERS

BUSINESS GROWTH ASSESSMENT

& Client Onboarding Questionnaire

A structured evaluation of your company's sales, marketing, operations, finance, people, and growth readiness — the foundation of your DeltaPoint Partners engagement.

01 Client Information

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Company

Contact

Date

Briefly describe your organization and what makes you different

02 Executive Business Assessment

What are the top three business goals over the next 12 months?

	Business Goal	Explain
☐	Increase Revenue	
☐	Increase Profitability	
☐	Hire Employees	
☐	Reduce Costs	
☐	Expand Markets	
☐	Government Contracting	
☐	Improve Customer Retention	
☐	Increase Sales	
☐	Operational Efficiency	
☐	Other	

03 Biggest Challenges

What keeps you awake at night? Check all that apply.

- ☐ Not enough sales
- ☐ Cash flow
- ☐ Employee turnover
- ☐ Finding qualified employees
- ☐ Competition
- ☐ Pricing pressure
- ☐ Marketing isn't working
- ☐ Sales team performance
- ☐ Operational inefficiencies
- ☐ Customer retention
- ☐ Supply chain
- ☐ Technology

Additional comments on the challenges above

04 Sales Assessment

Rate each statement about your sales function.

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Sales Challenge	Yes	No	Needs Improvement	Comments
Sales are predictable each month	☐	☐	☐	
We have enough qualified leads	☐	☐	☐	
Our sales pipeline is consistently full	☐	☐	☐	
Salespeople consistently follow up	☐	☐	☐	
We have a documented sales process	☐	☐	☐	
CRM is updated consistently	☐	☐	☐	
We know our sales conversion rates	☐	☐	☐	
We lose opportunities to competitors	☐	☐	☐	
Our proposals close consistently	☐	☐	☐	
Sales forecasting is accurate	☐	☐	☐	

05 Marketing Assessment

Rate the effectiveness of each marketing area.

Marketing Question	Excellent	Good	Fair	Poor	Comments
Website generates leads	☐	☐	☐	☐	
Marketing produces qualified opportunities	☐	☐	☐	☐	
Email marketing is effective	☐	☐	☐	☐	
Social media supports sales	☐	☐	☐	☐	
Brand messaging is clear	☐	☐	☐	☐	
Marketing ROI is measured	☐	☐	☐	☐	
We know our ideal customer	☐	☐	☐	☐	
We have a content strategy	☐	☐	☐	☐	

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Business Operations Assessment

Answer Yes or No for each operational concern.

Operational Concern	Yes	No	Comments
Business relies too heavily on owner	☐	☐	
Processes are documented	☐	☐	
SOPs exist for major functions	☐	☐	
Departments communicate effectively	☐	☐	
Projects finish on time	☐	☐	
Customer service is consistent	☐	☐	
Productivity is where it should be	☐	☐	
Technology supports growth	☐	☐	

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Financial Concerns

Answer Yes or No for each question.

Question	Yes	No	Comments
Revenue is predictable	☐	☐	
Profit margins meet expectations	☐	☐	
Cash flow is a concern	☐	☐	
Pricing is competitive and profitable	☐	☐	
Financial reporting is timely	☐	☐	
Budgets are followed	☐	☐	

08 Employee Assessment

Rate each area of your workforce.

Employee Concern	Excellent	Good	Fair	Poor	Comments
Employee morale	☐	☐	☐	☐	
Accountability	☐	☐	☐	☐	
Communication	☐	☐	☐	☐	
Productivity	☐	☐	☐	☐	
Leadership	☐	☐	☐	☐	
Teamwork	☐	☐	☐	☐	
Employee retention	☐	☐	☐	☐	
Training programs	☐	☐	☐	☐	

09 Human Resources Assessment

Answer Yes or No for each question.

HR Question	Yes	No	Comments
Hiring qualified employees is difficult	☐	☐	
Employee turnover is high	☐	☐	
Performance reviews are completed	☐	☐	
Job descriptions are current	☐	☐	
Employee handbook exists	☐	☐	
Compliance concerns exist	☐	☐	
Safety training is current	☐	☐	
Benefits are competitive	☐	☐	

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Customer Experience Assessment

Rate each element of the customer experience.

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Question	Excellent	Good	Fair	Poor	Comments
Customer satisfaction	☐	☐	☐	☐	
Customer retention	☐	☐	☐	☐	
Response time	☐	☐	☐	☐	
Complaint resolution	☐	☐	☐	☐	
Referral generation	☐	☐	☐	☐	

11 Leadership Assessment

Answer Yes or No for each question.

Leadership Question	Yes	No	Comments
Leadership team is aligned	☐	☐	
Company vision is clear	☐	☐	
Employees understand company goals	☐	☐	
Decisions are made quickly	☐	☐	
Accountability exists	☐	☐	

12 Technology Assessment

Answer Yes or No for each question.

Technology Question	Yes	No	Comments
CRM is fully utilized	☐	☐	
Marketing automation exists	☐	☐	
Reporting dashboards exist	☐	☐	
AI tools are being utilized	☐	☐	
Cybersecurity is current	☐	☐	

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Growth Readiness Assessment

Rate each area from 1 to 10.

Area	Rating (1–10)	Comments
Sales		
Marketing		
Leadership		
Operations		
Finance		
Technology		
Customer Experience		
Company Culture		
Total Score		

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Top Business Challenges

Rank your top five challenges and rate the impact (High / Medium / Low).

Rank	Challenge	Impact on Business
#1		
#2		
#3		
#4		
#5		

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Immediate Priorities

List your most pressing priorities and target dates.

Priority	Desired Completion Date	Comments

DeltaPoint Partners Consultant Assessment

To be completed by your DeltaPoint consultant.

Area	Score (1–10)	Notes
Sales		
Marketing		
Leadership		
Operations		
Human Resources		
Technology		
Financial Performance		
Customer Experience		
Overall Growth Readiness		
Total Score		

17 Overall Consultant Recommendations

Key recommendations, priority level, and timeline.

Recommendation	Priority	Timeline
	High / Medium / Low	
	High / Medium / Low	
	High / Medium / Low	
	High / Medium / Low	
	High / Medium / Low	

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FINANCIAL HEALTH DEEP-DIVE

A detailed review of profitability, cash flow, debt, risk, and long-term financial readiness.

Financial Health, Concerns & Issues

Answer each question and note the priority (High / Medium / Low).

Financial Health Question	Yes	No	Unsure	Priority	Comments
Is the business consistently profitable?	☐	☐	☐	H / M / L	
Is revenue growing year over year?	☐	☐	☐	H / M / L	
Is monthly revenue predictable?	☐	☐	☐	H / M / L	
Does the business maintain positive cash flow?	☐	☐	☐	H / M / L	
Are profit margins meeting expectations?	☐	☐	☐	H / M / L	
Are operating expenses under control?	☐	☐	☐	H / M / L	
Does the company have sufficient cash reserves?	☐	☐	☐	H / M / L	
Can the business cover at least three months of operating expenses?	☐	☐	☐	H / M / L	
Are financial reports reviewed monthly?	☐	☐	☐	H / M / L	
Are budgets created and followed?	☐	☐	☐	H / M / L	
Are financial goals clearly defined?	☐	☐	☐	H / M / L	
Is pricing based on actual costs and desired margins?	☐	☐	☐	H / M / L	
Are all products or services profitable?	☐	☐	☐	H / M / L	
Are underperforming products or services identified?	☐	☐	☐	H / M / L	

18 Financial Health, Concerns & Issues (cont.)

Financial Health Question	Yes	No	Unsure	Priority	Comments
Does the company know its break-even point?	☐	☐	☐	H / M / L	
Are accounts receivable collected on time?	☐	☐	☐	H / M / L	
Are customers paying within agreed-upon terms?	☐	☐	☐	H / M / L	
Is overdue customer debt a concern?	☐	☐	☐	H / M / L	
Are vendor bills paid on time?	☐	☐	☐	H / M / L	
Is business debt at a manageable level?	☐	☐	☐	H / M / L	
Are loan payments affecting cash flow?	☐	☐	☐	H / M / L	
Is the company dependent on credit cards or lines of credit?	☐	☐	☐	H / M / L	
Does the business have access to additional capital if needed?	☐	☐	☐	H / M / L	
Are taxes planned for and paid on time?	☐	☐	☐	H / M / L	
Are payroll obligations consistently met?	☐	☐	☐	H / M / L	
Are employee benefit costs financially sustainable?	☐	☐	☐	H / M / L	
Are insurance costs affecting profitability?	☐	☐	☐	H / M / L	

18 Financial Health, Concerns & Issues (cont.)

Financial Health Question	Yes	No	Unsure	Priority	Comments
Are supplier cost increases affecting margins?	☐	☐	☐	H / M / L	
Is the business overly dependent on one customer?	☐	☐	☐	H / M / L	
Would losing the largest customer create financial hardship?	☐	☐	☐	H / M / L	
Is the company financially prepared for an economic downturn?	☐	☐	☐	H / M / L	
Is the company financially prepared for unexpected equipment or technology expenses?	☐	☐	☐	H / M / L	
Are growth investments producing an acceptable return?	☐	☐	☐	H / M / L	
Is marketing return on investment measured?	☐	☐	☐	H / M / L	
Is sales performance aligned with financial goals?	☐	☐	☐	H / M / L	
Is the owner taking appropriate compensation from the business?	☐	☐	☐	H / M / L	
Is the owner regularly contributing personal funds to support the business?	☐	☐	☐	H / M / L	
Is the business building long-term enterprise value?	☐	☐	☐	H / M / L	
Could the business operate financially without the owner's daily involvement?	☐	☐	☐	H / M / L	
Is there a financial plan for succession, transition or eventual sale?	☐	☐	☐	H / M / L	

19 Financial Concern Rating Grid

Rate each financial area.

Financial Area	Excellent	Good	Needs Improvement	Critical Concern	Comments
Revenue growth	☐	☐	☐	☐	
Revenue predictability	☐	☐	☐	☐	
Cash flow	☐	☐	☐	☐	
Profitability	☐	☐	☐	☐	
Gross profit margin	☐	☐	☐	☐	
Operating expenses	☐	☐	☐	☐	
Cash reserves	☐	☐	☐	☐	
Accounts receivable	☐	☐	☐	☐	
Debt management	☐	☐	☐	☐	
Pricing strategy	☐	☐	☐	☐	

19 Financial Concern Rating Grid (cont.)

Financial Area	Excellent	Good	Needs Improvement	Critical Concern	Comments
Financial reporting	☐	☐	☐	☐	
Budgeting and forecasting	☐	☐	☐	☐	
Tax planning	☐	☐	☐	☐	
Capital availability	☐	☐	☐	☐	
Customer concentration risk	☐	☐	☐	☐	
Emergency preparedness	☐	☐	☐	☐	
Growth investment capacity	☐	☐	☐	☐	
Owner financial dependence	☐	☐	☐	☐	
Business valuation readiness	☐	☐	☐	☐	
Succession planning	☐	☐	☐	☐	

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Financial Issues & Concerns

Respond to each question in your own words.

Question	Response
What is your greatest financial concern today?	
What financial issue creates the most stress for ownership?	
Which expenses have increased the most over the last 12 months?	
Are there products, services or customers that are not profitable?	
What is currently limiting the company's ability to grow?	
Are cash-flow shortages affecting business decisions?	
Are slow-paying customers creating operational challenges?	
Is debt limiting the company's flexibility?	

20 Financial Issues & Concerns (cont.)

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Question	Response
Are current prices sufficient to support desired margins?	
What financial information do you wish you had greater visibility into?	
What financial decisions have been delayed because of uncertainty?	
What unexpected expense would create the greatest risk to the company?	
What percentage of revenue comes from the company's largest customer?	
How much working capital does the company need to operate comfortably?	
What financial improvements would have the greatest immediate impact?	

21 Key Financial Metrics

Record current and target results and note any gap.

Financial Metric	Current Result	Target Result	Concern or Gap
Annual revenue			
Monthly recurring or predictable revenue			
Gross profit margin			
Net profit margin			
Monthly operating expenses			
Monthly cash flow			
Cash reserves			
Accounts receivable outstanding			
Average customer payment time			

21 Key Financial Metrics (cont.)

Financial Metric	Current Result	Target Result	Concern or Gap
Total business debt			
Monthly debt payments			
Break-even revenue			
Largest customer percentage of revenue			
Sales and marketing cost			
Customer acquisition cost			
Average customer value			
Revenue per employee			
Owner compensation			

22 Top Financial Priorities

Your five highest-impact financial priorities.

Rank	Financial Priority	Business Impact	Recommended Action	Target Completion Date
1				
2				
3				
4				
5				

✓ Additional Comments & Next Steps

Use the space below for any additional comments or assessment notes.

Thank you for completing your assessment.

Your DeltaPoint Partners consultant will review your responses and build a tailored growth roadmap.