S. W. O. T. A N A L Y S I S

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 form 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 –
_____
_____
_____