OMB Number: 3133-0188

**Voluntary Business Needs Assessment Survey**

**Instructions**

Below you will find the voluntary needs assessment survey. This document includes a total of 10 questions that will cover different aspects of your business. The survey is divided in 3 parts:

1. **Contact Information**: Please complete the requested information, as stated, for the individual completing the survey. If you prefer to respond **anonymously**, you may leave this section blank and proceed directly to answering the survey questions.
2. **Business Condition Assessment:** Identify elements and tactics that might help improve your business’ financial position. (3 questions)
3. **Business Technical Assistance Needs**: For each question, select up to 3 items where assistance would be most useful to your business’ development. (7 questions)

Thanks for taking the time to complete this survey. We appreciate your participation!

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| **Business Contact Information\*** | |
| Business name (optional): |  |
| Point of contact name (optional): |  |
| Email (optional): |  |

*\*NCUA will use the Business Contact Information provided SOLELY for the purpose of follow-up communications and will not share such information publicly or outside of NCUA (unless required by court order to do so).  If you choose not to identify a point of contact, you can still provide an email address and we will communicate via the email address provided.*

**Business Condition Assessment**

1. Which of these two selections would most help your firm arrive at a better financial position?
   1. Increasing revenue
   2. Reducing expenses

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| **Comments**: |
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1. What would help your company increase its revenue targets? (e.g., identifying more opportunities, responding to more solicitations, assembling a competitively priced proposal package)

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| **Comments**: |
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1. What would help your company reduce expenses? (e.g., controlling payroll expenses, implementing more automation, managing general & administrative expenses)

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| **Comments**: |
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**Business Technical Assistance Needs**

1. **Financial Management** – please select up to 3 areas where your firm presently could use assistance

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | None |  |  | Financial / cash flow management |
|  | Business / strategic planning |  |  | Managing business profitability |
|  | Sources of capital |  |  | Controlling & reducing business costs |
|  | Bookkeeping / Financial statements |  |  | Increasing business revenues |

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| **Comments**: |
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1. **Marketing** – please select up to 3 areas where your firm presently could use assistance

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | None |  |  | Marketing planning |
|  | Marketing overview |  |  | Marketing strategies |
|  | Selling to the government |  |  | Sales techniques |
|  | Advertising |  |  | Networking |
|  | Capabilities Statements |  |  | Internet / Online Presence |
|  | Market research |  |  | Public relations |

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| **Comments**: |
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1. **Computer Systems** – please select up to 3 areas where your firm presently could use assistance

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | None |  |  | Email |
|  | Computers overview |  |  | Databases |
|  | Websites |  |  | E-commerce |
|  | Accounting software |  |  | Computerizing a business |
|  | Word processing |  |  | Cybersecurity |
|  | Spreadsheets |  |  | “Competitive Intelligence” |

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| **Comments**: |
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1. **General Management** – please select up to 3 areas where your firm presently could use assistance

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | None |  |  | Inventory Control |
|  | Insurance |  |  | Effective Communication |
|  | Setting Goals |  |  | Facility Planning and Management |
|  | Pricing |  |  | Disaster Contingency Planning |
|  | Strategic Planning |  |  | Legal work |
|  | Business Research |  |  | Leasing vs buying |
|  | Business Expansion |  |  | Diversification |
|  | Production |  |  | Succession planning |
|  | Business evaluation |  |  | Conflict management |
|  | Quality control |  |  | Security |
|  | Retirement planning |  |  | Technology transfers |
|  | Patents / trademarks / copyrights |  |  | Other (Please note below) |
|  | Policies and procedures manuals |  |  |  |

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| **Comments**: |
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1. **Personnel Management** – please select up to 3 areas where your firm presently could use assistance

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | None |  |  | Workplace ethics |
|  | Overview of personnel management |  |  | Motivating employees |
|  | Hiring / firing |  |  | Customer service |
|  | Employee evaluations |  |  | Small business labor requirements |

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| **Comments**: |
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1. **Regulatory Compliance** – please select up to 3 areas where your firm presently could use assistance

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| --- | --- | --- | --- | --- |
|  | None |  |  | Health care reform |
|  | Compliance with federal regulations |  |  | Drug free workplace |
|  | Small business legislation |  |  | Environmental / recycling |
|  | Business / Employee Tax Requirements |  |  | Government services to small businesses |

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| **Comments**: |
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1. **Training Delivery** - What is your #1 choice for education delivery?

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| --- | --- | --- | --- | --- |
|  | Seminar / Workshop |  |  | Video training |
|  | Traditional multi-week class |  |  | No preference |
|  | Internet class |  |  | Other (Please note below) |
|  | Self-study materials |  |  |  |

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| **Comments**: |
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