

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:

- A. **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.
- B. **Business Condition Assessment:** Identify elements and tactics that might help improve your business' financial position. (3 questions)
- C. **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!

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?
 - a. Increasing revenue
 - b. Reducing expenses

Comments:

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

Comments:

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3. What would help your company reduce expenses? (e.g., controlling payroll expenses, implementing more automation, managing general & administrative expenses)

Comments:

Business Technical Assistance Needs

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

<input type="checkbox"/>	None	<input type="checkbox"/>	Financial / cash flow management
<input type="checkbox"/>	Business / strategic planning	<input type="checkbox"/>	Managing business profitability
<input type="checkbox"/>	Sources of capital	<input type="checkbox"/>	Controlling & reducing business costs
<input type="checkbox"/>	Bookkeeping / Financial statements	<input type="checkbox"/>	Increasing business revenues

Comments:

2. **Marketing** – please select up to 3 areas where your firm presently could use assistance

<input type="checkbox"/>	None	<input type="checkbox"/>	Marketing planning
<input type="checkbox"/>	Marketing overview	<input type="checkbox"/>	Marketing strategies
<input type="checkbox"/>	Selling to the government	<input type="checkbox"/>	Sales techniques
<input type="checkbox"/>	Advertising	<input type="checkbox"/>	Networking
<input type="checkbox"/>	Capabilities Statements	<input type="checkbox"/>	Internet / Online Presence
<input type="checkbox"/>	Market research	<input type="checkbox"/>	Public relations

Comments:

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

<input type="checkbox"/>	None	<input type="checkbox"/>	Email
<input type="checkbox"/>	Computers overview	<input type="checkbox"/>	Databases
<input type="checkbox"/>	Websites	<input type="checkbox"/>	E-commerce
<input type="checkbox"/>	Accounting software	<input type="checkbox"/>	Computerizing a business
<input type="checkbox"/>	Word processing	<input type="checkbox"/>	Cybersecurity
<input type="checkbox"/>	Spreadsheets	<input type="checkbox"/>	“Competitive Intelligence”

Comments:

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

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

Comments:

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

<input type="checkbox"/>	None	<input type="checkbox"/>	Workplace ethics
<input type="checkbox"/>	Overview of personnel management	<input type="checkbox"/>	Motivating employees
<input type="checkbox"/>	Hiring / firing	<input type="checkbox"/>	Customer service
<input type="checkbox"/>	Employee evaluations	<input type="checkbox"/>	Small business labor requirements

Comments:

6. **Regulatory Compliance** – please select up to 3 areas where your firm presently could use assistance

<input type="checkbox"/>	None	<input type="checkbox"/>	Health care reform
<input type="checkbox"/>	Compliance with federal regulations	<input type="checkbox"/>	Drug free workplace
<input type="checkbox"/>	Small business legislation	<input type="checkbox"/>	Environmental / recycling
<input type="checkbox"/>	Business / Employee Tax Requirements	<input type="checkbox"/>	Government services to small businesses

Comments:

7. **Training Delivery** - What is your #1 choice for education delivery?

<input type="checkbox"/>	Seminar / Workshop	<input type="checkbox"/>	Video training
<input type="checkbox"/>	Traditional multi-week class	<input type="checkbox"/>	No preference
<input type="checkbox"/>	Internet class	<input type="checkbox"/>	Other (Please note below)
<input type="checkbox"/>	Self-study materials	<input type="checkbox"/>	

Comments:



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