

CONFIDENTIAL CLIENT DATA

Confidential Business Information Sheet

Date _____

Please complete the attached issues and Concerns for each business. It is important for us to understand the needs and desires you have for your business in order to have a more successful interview. True technology planning is the integration and coordination of your business goals.

Business Name _____ SIC code _____

Business Address _____

Business Phone _____ Fax _____

Form of Business (circle one)

Sole Proprietor Partnership - General or Limited Corporation - "C" - "S" - "LLC"

Nature of Business: _____

Owner's Name(s) First	Last	Age	% Owned	Position	Technology Comfort Level 10 = complete
1					
2					
3					
4					
5					

Number of Employees _____ Full Time _____ Part Time _____

Age of Business _____ years

Is your business computerized today? Yes No

Please rate your answers to the following questions on a scale from 0 (completely false) to 5 (completely true).

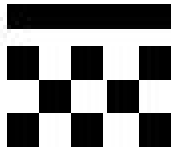
The owner(s) feel comfortable with how our computer technology is used. _____

The owner(s) believe that new technology is too expensive. _____

The owner(s) believe that computer technology is an investment. _____

We are getting a good return on our computer technology investment. _____

Our employees are happy with our computer systems. _____



PC Tech Associates

Computer Services

CONFIDENTIAL CLIENT DATA

Issues and Concerns - Business

Name _____ Position _____ Date _____

Please check the answer that best describes your situation:

	Yes	No	I Don't Know
Have increased costs, increased processing times, decreased productivity, decreased financial controls or quality assurance had an effect on your Profit Margin?			
Are you using your computer systems to their maximum potential?			
Are your computer systems functioning in a stable manner?			
Do you find good computer help when you need it?			
Do you have a plan in place to run your business after a disaster?			
Are there areas of your company that could benefit by using computer technology or using it better?			
Are you generally happy with your technology investment?			
Do you feel that you should only invest in proven technology?			
Do you worry that investments in computer technology will not show a positive return?			
Do you have a plan for obtaining new computer technology as it is needed?			
Have you ever worked with a computer consultant before?			
Do you or your employees complain about how you or computers work?			
Do you/employees lose productive time fixing computer problems?			
Do you have an internal technology support plan in place?			
Is there a dollar amount or revenue percentage allotted to support your technology investment?			
Do you have a written computer technology plan?			
Are you using this plan for implementation?			
Do you have a current, comprehensive inventory?			
Do you have a policies and procedures manual?			
Do you need coordination and integration of your technology issues?			

What do you hope will be sped up, helped or transformed by this computerized effort? _____

What time frame did you have in mind for completion of this effort? _____

Have you set aside money for this effort? _____

If this effort involves new technology or a new way of using it in your business, how much time have you set aside to devote to it? _____

Do you have a method in mind as to how this effort will be completed? _____

Additional Comments: _____