

First Name _____ Last Name _____

Business Name _____ Date _____

Business Self Assessment

This self-assessment form lets you rate your ability in key business areas like marketing, finance, management, and using systems. You will check the box with the statement that best reflects your understanding of the subject listed. This document will be used to evaluate which resources best fit your needs and will not be shared outside of this organization. Once filled out, a WWBIC counselor will suggest a plan of action based on your current level of understanding of topics reflected below.

Self Assessment				
Instructions: Please put a checkmark in the box that best reflects your understanding of the following;	This is something I need to learn	I understand this but have not yet applied	I understand and apply, but could improve	I understand this and apply it effectively
Marketing				
Defining and reaching the target market				
Communicating product/service features and benefits effectively				
Aligning my marketing plan to support my revenue and profit goals				
Creating and managing a website for my business				
Utilizing social media and local listing to support my business (ie Instagram)				
Measuring the results of my marketing efforts				
Money				
Creating and using cash flow projections				
Creating and understanding a Profit & Loss				
Creating and understanding a Balance Sheet				
Calculating break-even and profit needed to reach goals				
Staying current on all tax obligations (sales, payroll, income)				

Self Assessment					
Instructions: Please put a checkmark in the box that best reflects your understanding of the following;		This is something I need to learn	I understand this but have not yet applied	I understand and apply, but could improve	I understand this and apply it effectively
Management					
Utilizing time management strategies					
Evaluating and implementing systems that enhance operations (Accounting, Inventory, Employee Standard Operating Procedures, etc)					
Knowing when and who to hire					
Training employees					
Retaining employees/reducing turnover					
Technology					
Using computers (operate a laptop, using email, web searches, printing...)					
Do you need a computer?		Yes		No	

Systems Used	
Accounting System	
Credit Card / Point of Sale System	
Payroll	
Inventory	
Website Platform(s)	
Marketing Channels (Facebook, Instagram, Yelp, etc)	
Other	

Other Assistance needed:

Legal/Attorney: Yes or No

Accounting: Yes or No

Marketing/Website Design: Yes or No

Funding: Yes or No

Other: _____

Would you like to be linked with a mentor? Yes or No

Do you prefer in-person trainings or virtual trainings: In-Person or Virtual

Other comments:

Action Plan: To be filled out by WWBIC Staff

Basics

- Client Information Form (CIF)
- Business Information Form (BIF)
- Employee Information Form A (EIF A)
- Employee Information Form B (EIF B)

Recommended Trainings: See attached highlighted training sheet

Note: sign up at wwbic.com/trainings

Initiate portal: You will receive an email inviting you to sign up.

Documents Needed:

- Proof of Business (LLC, EIN, Inc, S-Corp, etc)
- Cashflow
- Projections
- Taxes
- Bank Statements
- Other:

Business Registration

- Articles of Organization (LLC, Sole Proprietorship, S-Corp, Inc.)
- Employee Identification Number (EIN)
- Insurance
- Operating Agreements
- Selling Permit / Required Licenses
- Risk Management / Client waiver forms
- Business bank account
- Business Plan

Events to Attend:

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Referral:

- Kiva Capital Access Manager
- Comienzos
- Small Business Consultant
- Regional Director
- Loan Officer
- Regional Office Coordinator

Certifications Needed:

- Food: ServSafe
- Market Vending: Municipality and/or County Permit
- Single Home Child care Certification: Family Childcare Certification (ex: 4C)
- Child care License: Department of Children and Families
- Adult Family Home License: Department of Health Services
- Transportation (CDL): Division of Motor Vehicles
- Trade Certification: Department of Safety and Professional Services
- Other (Permits, Licenses, Vending License, etc):

External Referrals:

Counselor:
