



Sharpen Our Skills

Business Assessment Questions

2/14/25

Presented By Oakland Thrive



Questions that quickly evaluate client needs/assessment across the Six Core Pillars of Business:

1. Business Consulting

A. Business Strategy:

- Do you have a clear business plan or strategy?
- Are your business goals clearly defined and measurable?
- Is there a need to adjust your business model or operations?

B. Growth & Scalability:

- Are you looking to scale? If yes, how are you planning to do that?
- Are there any current obstacles to growth (e.g., market conditions, competition)?

C. Operational Efficiency:

- Are your internal processes optimized for efficiency?
- Do you need assistance with systems, workflows, or performance monitoring?

2. IT (Information Technology)

A. Tech Infrastructure:

- Do you have the right technology tools for your business operations?
- Is your IT infrastructure secure and up-to-date?

B. Software & Automation:

- Are you using any software to automate tasks (e.g., CRM, accounting)?
- Are there any software solutions you're considering or struggling to integrate?

C. Cybersecurity:

- Do you have a cybersecurity plan in place to protect sensitive data?



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3. Legal

A. Business Structure:

- Is your business structured in a way that aligns with your goals (LLC, corporation, etc.)?
- Do you need assistance with structuring or re-structuring your business?

B. Compliance & Contracts:

- Are you up-to-date on regulatory and compliance requirements for your industry?
- Do you need help with drafting or reviewing contracts (e.g., employee, vendor)?

C. Intellectual Property:

- Are your intellectual properties (trademarks, patents, etc.) properly protected?

4. HR (Human Resources)

A. Staffing & Recruitment:

- Are you facing any challenges in hiring or retaining talent?
- Do you have a formal recruitment and onboarding process?

B. Employee Management:

- Do you have an employee handbook and clear policies in place?
- Are your performance management and compensation strategies effective?

C. Legal Compliance:

- Are you compliant with labor laws (e.g., wages, working hours, benefits)?
- Do you need assistance with employee contracts or disputes?



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5. Accounting/Finance

A. Financial Planning & Budgeting:

- Do you have a clear financial plan and budget?
- Are you tracking your cash flow effectively?

B. Tax Compliance:

- Are you staying on top of tax requirements (income tax, sales tax, etc.)?
- Do you need help with tax planning or filings?

C. Financial Health:

- Are your financial statements accurate and regularly updated?
- Do you need assistance with forecasting, funding, or improving profitability?

6. Marketing

A. Brand & Online Presence:

- Is your brand messaging consistent and clear?
- Do you have a strong online presence (website, social media, SEO)?

B. Customer Acquisition & Retention:

- Do you have a strategy for acquiring new customers?
- Are you focusing on customer retention through loyalty or engagement strategies?

C. Marketing Metrics:

- Are/how are you measuring the effectiveness of your marketing efforts?
- Do you need help with digital marketing or market research?