




WHAT ROCKS YOUR WORLD QUESTIONNAIRE

DEFINE DESIGN ALIGN




BEGIN.

Name:

Date:

PERSONAL

1. Please tell me a bit about you, your family life and what lights your fire?
2. How do you feel about your personal life? What feels great and what are your greatest challenges?
3. What specific changes would you like to make in your personal life? (More exercise, time with your children, organization in your home, new hobbies etc.)
4. Personal Finances: Do you have a clear understanding of your finances and how do you feel about your financial health? What do you want to change about it?



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5. Please check mark the areas in your personal life that need the most attention:

- ☐ Vision
- ☐ Personal Planning
- ☐ Time Management and Prioritizing
- ☐ Financial Management
- ☐ Health
- ☐ Work/Life Harmony
- ☐ Family Management
- ☐ Home Organization
- ☐ Communication
- ☐ Other, please describe:


6. Is there anything else about your personal life that is important for you to share?
(Are you going through any personal transitions etc.)

BUSINESS

7. Please tell me about your business. How do you feel about your business?
What is out of alignment and what excites you the most?

A white ceramic mug with the word "BEGIN." printed in a black, typewriter-style font. The mug is positioned on the right side of a light-colored wooden surface with visible grain. The background is a soft, out-of-focus light beige. A thin black rectangular border is superimposed over the image, starting from the left edge and extending to the right edge, just below the top of the mug.

8. What are the top three business goals that you want to achieve in the next year?
9. What are the three biggest obstacles that you feel you need to overcome in order to achieve your goals?
10. What do you know you need in order to achieve success this year?
11. What are the biggest stories that come up for you around growing your business?




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12. Please check mark the areas of your business that need the most attention:

- ☐ Vision
- ☐ Planning and Strategy
- ☐ Time Management and Prioritizing
- ☐ Financial Management
- ☐ Products/Service Development
- ☐ Branding
- ☐ Marketing Strategy
- ☐ Social Media
- ☐ Office Systems
- ☐ Client Management and Communication
- ☐ HR/Team productivity
- ☐ Office Space or Work Space
- ☐ Other, please describe:

13. Finances: Do you have a clear understanding of your business finances and an effective accounting system? Is your business financially sustainable or not? Describe your situation and indicate the desired revenue increase for the next year (You can just ballpark this if you are not 100% clear).

14. Products/Services: What current products and/or services do you provide? Do you have any challenges and are you considering any changes, improvements or new products?




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15. Brand: Is your branding in strong alignment with your business and if not, what changes need to happen in the next year?

16. Market: Do you have a clear understanding of your target market and if so, who are they?

17. Marketing: Do you have a clear marketing plan and what current marketing activities do you do? What are your greatest marketing challenges and what changes do you want to make in the next year?

18. Sales: Do you have a consistent flow of customers? If no, please indicate the desired increase in customer base for the next 12 months and what you already know you need to do to increase sales.




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19. Operations: Do you have standard operating policies and procedures (SOP) in your business? Yes No

20. What systems do you need to re-vamp or develop?

- ☐ File management and retrieval
- ☐ Project management and team communication
- ☐ Scheduling and personal calendar management
- ☐ Client/contact management (CRM)
- ☐ Financial management system (accounting)
- ☐ Policies and Procedures management (updating & retrieval)
- ☐ Desktop Management (incoming and outgoing)
- ☐ Product/Service delivery and follow up

21. Team: What team members do you have on board, what's working and not working and where do you need more support? (These do not have to be employees only, if you are a solopreneur, you may use subcontractors).



BEGIN.

EXPANSION

22. If you received \$5,000,000 today, what would you change about your life and business? What would you do differently?

23. If you could wave a magic wand, what are the top three things that you would change, do or accomplish in the next six months?

Do you have anything else you would like to share or have any questions?