**OwnerBox Intake Form**

**Instructions:** Please take time to go through the videos and corresponding worksheets below.

Note regarding this worksheet: Before filling out this worksheet and to prevent any data loss, please do a 'save as' on your computer, save the file to your hard drive, complete the worksheet, then save again. If you try and fill this out online without saving it your changes will be lost.

Please return your completed form to Leilani Bond at [Leilani@eventualmillionaire.com](mailto:Leilani@eventualmillionaire.com).

**General**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  | **per month $** | **per year $** |
| 1. Average gross/net revenue per month & per year: | |  |  |  |
|  |  |  |  | |
| 2. average working hours per week for the owner: | |  |  | |
|  |  |  |  | |
| 3. Goal of working hours per week for the owner in the next year: | |  |  | |
|  |  |  |  | |  |  |

4. Please indicate what types of systems and technology you currently have in place below.

|  |  |
| --- | --- |
| Scheduling / calendar software (i.e. Google calendar, ScheduleOnce) |  |
| Email management (i.e. Gmail, Outlook) |  |
| File Management (i.e. Dropbox, G Drive, Manual Files) |  |
| Dashboard or KPI / System Tracking Software |  |
| Project Management Software |  |
| Web Conferencing |  |
| Accounting Software |  |
| Password Safekeeping (How are your passwords saved?) |  |
| Website Platform (ie. Wordpress, etc.) |  |
| Back-up Software |  |
| Team Meetings (Do you use a software? How are team meetings ran?) |  |

**Business Systems**

1. Do you currently track any business metrics or KPIs?

List the metrics you currently track every week, month or quarter.

*(ie. Google Analytics, Facebook Ad Conversion And Spend, Lifetime Value of A Customer, etc.)*

|  |
| --- |
|  |

[**Click here for a list of business metrics**](http://ask-leadmagnets.s3.amazonaws.com/Business%20Metrics.pdf?inf_contact_key=13bc4022bfea1626f5591f22ae259656d6c0d628d62781e22f15d3be96451abd)

2. Indicate below what systems you currently have in place (with SOPs and workflows):

|  |  |
| --- | --- |
| Team Meetings + Agenda (weekly & monthly) |  |
| KPI tracking weekly |  |
| Travel management |  |
| Scheduling |  |
| Communication |  |
| Sales workflow and process |  |
| Client/customer onboarding |  |
| File management |  |
| Employee reviews |  |
| Employee hiring |  |
| List any others that you use regularly |  |

**Your Products**

1. List your products/services from lowest to highest. (Name, Description, Avatar, Price, Sales per Month)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Name** | **Description** | **Avatar** | **Price** | **Sales (Monthly)** |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |
| 5. |  |  |  |  |  |
| 6. |  |  |  |  |  |
| 7. |  |  |  |  |  |

**TEAM AND RESOURCES**

1. List your team members, their titles, strengths (or DISC, Kolbe scores, etc.)

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Name** | **Title** | **DISC / Kolbe scores / Strengths** |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |
| 6 |  |  |  |
| 7 |  |  |  |
| 8 |  |  |  |
| 9 |  |  |  |
| 10 |  |  |  |

**FINANCES**

|  |  |  |  |
| --- | --- | --- | --- |
| 1. Do you currently have a bookkeeper? |  |  |  |
|  |  |  |  |
| 2. How much profit is (or SHOULD) your business be making? |  |  |  |
|  |  |  |  |
| 3. What are your average monthly business expenses? |  |  |  |