

Business Context Summary Outline (copy and paste onto your own sheet)

1. General Information

- **Business Name:**
- **Website URL:**
- **Industry:**
- **Date Founded:**
- **Location(s):**

2. Business Structure

- **Legal Structure** (e.g., LLC, Corporation, Sole Proprietorship):
- **Ownership Structure** (e.g., single owner, partnerships, shareholder breakdown):
- **Parent/Subsidiary Relationships** (if applicable):

3. Mission, Vision, and Values

- **Mission Statement:**
- **Vision Statement:**
- **Core Values:**

4. Products and Services

- **Main Products/Services Offered:**
- **Unique Selling Proposition (USP):**
- **Target Customer Segments:**
- **Pricing Model:**

5. Market Position

- **Current Market Position** (e.g., leader, challenger, niche):
- **Top Competitors:**
- **Competitive Advantages:**
- **Known Weaknesses:**

6. Financial Overview

- **Annual Revenue** (optional but helpful):
- **Key Revenue Streams:**
- **Profit Margins:**
- **Funding Sources** (e.g., self-funded, VC, loans):

7. Team Structure

- **Total Number of Employees:**
- **Departments/Teams and Their Functions:**
- **Key Leadership Roles:**
- **External Partners or Contractors** (e.g., agencies, consultants):

8. Current Marketing and Sales

- **Primary Marketing Channels** (e.g., social media, email, SEO, ads):
- **Sales Process** (e.g., inbound, outbound, partnerships):
- **Marketing Budget** (optional):
- **Sales Team Size and Organization:**
- **Key Marketing Campaigns/Initiatives:**

9. Technology and Tools

- **Core Tools/Platforms** (e.g., CRM, email marketing, analytics):
- **Website/Online Presence:**
- **Tech Challenges:**

10. Challenges and Opportunities

- **Biggest Current Challenges:**
- **Growth Opportunities Identified:**
- **Market Trends/Industry Changes:**

11. Goals

- **Short-Term Goals** (next 6–12 months):
- **Long-Term Goals** (1–5 years):
- **Key Performance Indicators (KPIs):**

12. Additional Information

- **Unique Insights or Context About the Business:**
- **Other Information You Want Considered:**