

## JOINT VENTURE ASSESSMENT FORM

*Note: Completion of this Assessment is necessary for us to make an intelligent analysis about the potential to create a strategic relationship for your business and is for discussion purposes only. Please answer the questions as completely and accurately as possible and email the completed form to: **Happy@sonomajvpartners.com**. We will then contact you to schedule a discovery call.*

**Company Name:** \_\_\_\_\_

**Your Name and Title:** \_\_\_\_\_

**Your Phone Number:** \_\_\_\_\_

**Your Email address:** \_\_\_\_\_

**Industry:** \_\_\_\_\_

**Website:** \_\_\_\_\_

**Products and Services Offered:** \_\_\_\_\_

### Customer/Prospect List Size

- What is the size of your email list? \_\_\_\_\_
- How many on your list are paying customers, and how many are prospects which have never purchased anything? \_\_\_\_\_

### Company Information:

- How many years has the company been in business? \_\_\_\_\_
- What are the average gross sales over the past 3 years?
  - \$100,000 - \$250,000
  - \$250,000 - \$500,000
  - \$500,000 - \$1,000,000
  - \$1,000,000 - \$5,000,000
  - \$5,000,000 +

- What is the company's gross annual profit margin? \_\_\_\_\_

### **Company Goal**

- What objectives would you like to achieve to achieve through a strategic alliance?

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### **Value Proposition**

- What is your company best known for? (Quality – Price – Reliability – Quick delivery, etc.)

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### **Product Information**

- What is your most profitable product/service and what does it sell for?

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- What percentage of current customers has already purchased that product?

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- What, if anything prevents your customers from buying this product again?

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### **Opportunity Information**

- What products or services do your customers purchase before buying your product?

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- What products or services do your customers purchase after buying your product?

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