

Client Questionnaire

Please help us to get to know you and understand your business better by completing our client questionnaire.

Client Name

Dinner with Friends

Owners/ Directors Name/s *

Peter Sams

What is the main purpose of the business (describe products, services, and client profile)

To provide an intimate space for friends to have dinner together

Briefly describe you experience in business

5 years working in the hospitality industry

Length of time in current business

3 years

What do you want to achieve in this business?

Establish a sustainable business that is known in the local community

Where do you see your business in two, five, and ten years

two years - \$450,000 turnover, 5 years operating 2 premises, 10 years retired.

Where is your business now in relation to where it needs to be?

We are currently turning over \$160,000 pa. I am currently working 6 days a week to reduce staff costs. I would like to minimise hours so that I have more work-life balance

What are the key steps you need to take to get there?

Generate enough revenue to employ a restaurant manager and more service staff.

What are the most important things you want from your bookkeeper / accountant?

reconciling bank accounts, preparing and lodging BAS, processing payroll

Identify key employees, their length of their service and any ambitions, goals, and objectives you are aware of for them?

James Brown - Chef

How long do you want to stay involved in this business?

- 1-2 years
- 3-5 years
- 6-10 years
- 10 years +

What else do you like to do apart from working in the business (hobbies, interests, etc.)?

Gardening, walking, swimming

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