

01 business basics

Print or fill in.

Form 01: business basics

Best answered by: the owner, or whoever runs it day to day **Time:** 20 minutes **Fills:** `company/identity.md`, `company/people-and-roles.md`

Answer in your own words. Short is fine. Sounding professional is not the goal here, and polished answers are usually less useful than blunt ones.

Completed by: _____ · Date: _____

The basics

Legal name:

Name you trade under:

Year you started:

Where you are based:

How far you travel for work:

How the business is structured:

Website, or "none":

In one sentence

What does the business do? Say it the way you would to a stranger at a counter, not the way it would appear on a website.

How it started

Why does this business exist? What were you doing before?

What makes you different

What can you do, or do better, than the others around you? Be specific. If the honest answer is "nothing much, we just do it properly," that is a real answer and more useful than most.

What you are not

What do people assume you do that you do not? What work do you turn down?

What you are proud of

The thing you would mention without being asked.

Where it is heading

Growing, holding steady, changing direction, winding down toward a sale or handover? Be honest. Nobody outside sees this and it changes what advice is worth giving.

The people

How many people, and what is the split between full time, part time and seasonal?

List every role and what it covers. Roles, not names.

Role	Responsible for	Can decide on their own

Who can approve a discount, authorize spending, or turn down a job? Include the limits.

Who deals with {{CUSTOMER_WORD}}s, and who does not?

Outside help you rely on. Accountant, bookkeeper, subcontractors, seasonal workers, whoever does the website.

Who	What they do	How often

What can only one person do? Every business has something. What breaks if they are away for a month?

Does the headcount change through the year? When, and by how much?