



The Next Step Retail Solutions New Client Information Sheet

The following information will help our consultants at The Next Step Retail Solutions better understand your business needs.

All the information shared will remain confidential.

Upon completion of this information please:

Print and fax your completed form to 949-713-7442

Or

Email your completed form to jnovick@retail-solutions.biz.

If you have any questions or concerns, please feel free to contact us at jnovick@retail-solutions.biz. Thank you.

- ❖ Date _____
- ❖ Client Name _____
- ❖ Client Address _____
- ❖ Client Web Address _____
- ❖ Years in Business _____
- ❖ Primary Contact _____
- ❖ Contact Email _____
- ❖ Contact Phone / Fax _____
- ❖ Describe your product(s) / services:

❖ Do you have a print catalog? How often is it published?

❖ Do you have an online catalog? How often is it updated?

❖ Do you do business online? Do you work with other online retailers and / or host your own internet business?

❖ What is your primary demographic?

❖ What trade shows do you attend? How often?

❖ Do you advertise and where?

❖ Who are your top 5 clients?

❖ Who are the top 5 prospective clients?

- ❖ What are your short term (one month) goals / objectives for your business?

- ❖ What are your long term (one year) goals / objectives for your business?

- ❖ List the five areas of your business that you need the most help with:

- ❖ List the five areas of your business that you need the least help with:

- ❖ Do you have a business plan? How many years is it for?

- ❖ How many employees do you have? Are you satisfied with them and the morale of your company?

❖ Does your company have a mission statement?

❖ Do you use Sales Representatives and if so who?

❖ What networking organizations do you belong too?

❖ Where do you source and manufacture your product(s)?

❖ Are you satisfied with your products pricing?

❖ Are you satisfied with the quality of your product(s)?

❖ Do you have POP (point of purchase) materials and or display's / hangs tags?

❖ What questions do you have about The Next Step Retail Solutions?
