Assessment questionnaire

Profile: Business group

This is the complete questionnaire so you can prepare at your own pace. When you are ready, fill it out online and receive a copy by email: **https://docs.instfy.com/en/form-assessment/?perfil=grupo-empresarial**

Estimated time: about 10 minutes · Fields marked * are required in the online form. Never write passwords in this questionnaire.

Who it is for: groups with several companies, brands or business units.

WHAT WE ASSESS MORE DEEPLY

The business portfolio · Synergies · Corporate and management structure · Capital allocation · Shared services · Consolidated data

KEY QUESTIONS

- Which businesses create the most value?
- Where is there overlap or an opportunity for integration?
- How do you decide where to invest?

You receive: an integrated view of the group, with portfolio priorities and synergy opportunities.

Your details

So we can send your copy and get back to you.

1. Full name *

2. Email *

3. Phone or WhatsApp

4. Your role

5. Company *

6. Company website or social profile

7. City and country

Who the business is

The type of business completely changes the analysis.

8. Which profile best describes your business? *

Choose one option

☐ Company being created ☐ Startup ☐ Small or mid-sized business ☐ Family business
☐ Established company ☐ Business group ☐ Manufacturing ☐ Retail ☐ Services ☐ Franchise
☐ Personal brand ☐ Public institution ☐ Multinational

9. Industry

10. How long has the business existed?

Choose one option

☐ Not started yet ☐ Less than 2 years ☐ 2 to 5 years ☐ 5 to 15 years ☐ More than 15 years

11. Team size

Choose one option

☐ Just me ☐ 2 to 10 ☐ 11 to 50 ☐ 51 to 200 ☐ More than 200

12. Approximate annual revenue

Choose one option

☐ I prefer not to say ☐ No revenue yet ☐ Up to US$ 250k ☐ US$ 250k to 1M ☐ US$ 1M to 10M
☐ Over US$ 10M

Questions for your profile

Questions specific to the profile you chose. They make our first conversation much more focused.

13. How many companies, brands or units are part of the group, and in which industries? *

14. What is shared across the companies?

Check all that apply

☐ Finance ☐ People and HR ☐ Technology ☐ Purchasing ☐ Marketing ☐ Nothing yet

15. Is there a consolidated view of results?

Choose one option

☐ Yes, in real time ☐ Yes, periodically ☐ No

16. How are investment decisions made today?

17. Where do you see overlap or opportunities for integration?

Where you are and where you want to go

You do not need to be sure what the problem is. Finding out is also our job.

18. What best describes your moment? *

Choose one option

☐ Create something new ☐ Transform what exists ☐ Develop and gain efficiency
☐ Expand into new markets

19. What is your main challenge today? *

20. Where do you want to be in the next 12 to 24 months? *

21. Which areas seem most involved?

Check all that apply

☐ Strategy and business model ☐ Products and services ☐ Sales ☐ Marketing and brand
☐ Technology and systems ☐ AI and automation ☐ Data and metrics ☐ Operations and processes
☐ People and organization ☐ Finance ☐ Expansion and international growth

22. What has been tried so far?

Priority and next steps

23. When would you like to start?

Choose one option

☐ Right away ☐ Within 30 days ☐ Within 3 months ☐ Still evaluating

24. Who decides on this project?

Choose one option

☐ I decide ☐ I decide with partners or the board ☐ Someone else decides

25. How do you prefer to be contacted?

Choose one option

☐ Email ☐ WhatsApp ☐ Video call ☐ Phone

26. How did you hear about Instfy?

Choose one option

☐ Referral ☐ Instfy partner ☐ Google search ☐ AI assistant ☐ Social media ☐ Event ☐ Other

27. Anything else we should know?