



Assessment questionnaire

Profile: Small or mid-sized business

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=pme>

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

Who it is for: operating businesses that want to grow with better margins and less improvisation.

WHAT WE ASSESS MORE DEEPLY

Sales and channels Pricing
Costs and margin Processes
Financial management Use of technology
Dependence on the owner

KEY QUESTIONS

- Where is the company losing money or time?
- What is keeping it from the next revenue level?
- What can be automated?

You receive: the real bottlenecks in the business, quick-win opportunities and a direction for growth.

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. Where does the company lose the most money or time today? *

14. Current sales channels

Check all that apply

- ☐ Physical store ☐ In-house sales team ☐ Sales reps ☐ Website or e-commerce
☐ Marketplaces ☐ Social media and WhatsApp ☐ Referrals

15. Do you know your margin by product or service?

Choose one option

- ☐ Yes, precisely ☐ Roughly ☐ No

16. How much does the operation depend on the owner?

Choose one option

- ☐ Completely ☐ To a large extent ☐ A little ☐ The team runs it without me

17. What systems and controls do you use today (spreadsheets, ERP, CRM)?

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?
