



Assessment questionnaire

Profile: Services

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=servicios>

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

Who it is for: professional services firms, agencies, consultancies, healthcare, education and other people-based operations.

WHAT WE ASSESS MORE DEEPLY

Positioning Value proposition Pricing
Sales process Team capacity
Delivery standardization Recurring revenue

KEY QUESTIONS

- Does the company sell hours or results?
- Does delivery depend on a few people?
- How do you grow without losing quality?

You receive: a diagnosis of positioning, sales and operations, with paths to scale delivery.

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. What services do you provide, and to what type of client? *

14. How do you charge?

Choose one option

- ☐ By the hour
- ☐ Per project
- ☐ Monthly fee or recurring contract
- ☐ Performance-based
- ☐ Mixed

15. How much of your revenue is recurring?

Choose one option

- ☐ Almost none
- ☐ Up to half
- ☐ More than half

16. Does delivery depend on just a few people?

Choose one option

- ☐ Yes, heavily
- ☐ Partly
- ☐ No, it's standardized

17. What keeps you from growing without losing quality?

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?
