

**DBE Supportive Services Program**Today's Date: **Preliminary Business Assessment**

Company Name:

Business Description (brief):

Company Representative:

Title:

Year Company Founded:

email:

Phone:

(O)

(M)

List Up To Six Applicable NAICS Codes For Your Business (<https://www.naics.com/search/>):**A Little More Information About Your Company**

of full-time Employees

of part-time employees

of 1099/W9 personnel

Max temp personnel avail

Total annual payroll \$

Total annual gross sales \$

Are you teaming with any other DBEs on projects?

Yes

No

Planning

Do you have a written business plan?

Yes

No

Do you have a written marketing plan?

Yes

No

Do you have a written financial plan and forecast?

Yes

No

Do you have a written succession plan?

Yes

No

Legal

Have you determined your ideal business structure?

Yes

No

Have you taken the necessary steps to register your company?

Yes

No

Have you registered your business trade name in Arizona?

Yes

No

Have you applied for all applicable sales tax licenses?

Yes

No

Do you have a designated company attorney?

Yes

No

Preliminary Business Assessment

Human Resources

Are you familiar with all current immigration/employment laws?	Yes	No	
Do you understand how to determine contractor vs. employee status?	Yes	No	
Do you have any difficulty finding good employees?	Yes	No	N/A
Do you offer a training program for your employees?	Yes	No	N/A
Do you have an employee manual?	Yes	No	N/A
Do you understand workers' compensation requirements?	Yes	No	
Do you have an employee benefit program in place?	Yes	No	N/A
Is your compensation structure competitive?	Yes	No	Not Sure

Financial

On a 1-5 scale (5=high), rate your understanding of company financial management tools and techniques.

1 2 3 4 5

Do you use special accounting software?	Yes	No	
Do you fully understand your costs when preparing a proposal?	Yes	No	
Do you fully understand what banks need when reviewing loan applications?	Yes	No	
Do you have sufficient bonding coverage?	Yes	No	N/A
Do you have an established estimating system in place?	Yes	No	
Are you confident in your estimating system?	Yes	No	
Do you review your P&L statement at least quarterly and make adjustments to your financial management as a result?	Yes	No	
Do you keep and update regularly a balance sheet?	Yes	No	
Do you believe you have room for improvement in creditworthiness?	Yes	No	
Are your accounts payables and accounts receivables at satisfactory levels?	Yes	No	
Have you established leading indicators as early checkpoints to alert management if you are staying on budget/plan?	Yes	No	

Risk Management

Do you understand your insurance requirements?	Yes	No	
Have you obtained all necessary business insurance?	Yes	No	
Do you offer employees health insurance?	Yes	No	N/A
What is your bonding capacity?	\$		

Preliminary Business Assessment

Marketing

Do you have a company logo?	Yes	No	
Do you have a company website?	Yes	No	
Do you understand how to build/change your website?	Yes	No	
Do you have company marketing collateral (brochures, etc.)?	Yes	No	
Do you have a community engagement/networking plan?	Yes	No	
Do you have a sales/projects leads program in place?	Yes	No	
Can you state your company 'elevator pitch'?	Yes	No	
Do you know how to build a brand positioning statement?	Yes	No	I Don't Know
Have you identified a leads to projects ratio that will drive your success?	Yes	No	
Do you have a sponsorship plan for events?	Yes	No	
Do you have a public relations plan?	Yes	No	
Have you generated your ADOT Company Mini-Bio?	Yes	No	
Is your SAM.gov listing up to date?	Yes	No	

Other Business Skills

Are you comfortable with business writing skills?	Yes	No	
Do you utilize time management tools?	Yes	No	
Are you or do you have a team member who is experienced in project management?	Yes	No	
Would partnering and business relationship skill building training be helpful?	Yes	No	

Industry Specific

Do you have a written safety program and plan?	Yes	No	
Are you prepared for FARS/Audits?	Yes	No	
Do you feel that you have a chance to work with Primes?	Yes	No	
Do you understand how Primes select subs and how to make your company more attractive?	Yes	No	
Do you intend to act as a Prime on certain projects?	Yes	No	
Do you have a standard "pre-work starting" program in place to train your employees on the project?	Yes	No	

What is the size of your largest project to date?

\$

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ADOT Specific

Are you comfortable with the bidding website?	Yes	No
Do you know where to go within ADOT for help?	Yes	No
Are you getting the most out of your certification?	Yes	No
Do you participate in the Expo and conferences?	Yes	No
Do you understand the intricacies of ADOT contracts?	Yes	No
Is your AZUtracs information correct?	Yes	No
Do you know where to find ADOT procedures and forms?	Yes	No
Do you know how to complete ADOT forms?	Yes	No
Do you understand the ADOT prequalification process?	Yes	No
Can you always determine if you are applying for the “right” work?	Yes	No
Do you understand programs available to you from ADOT BECO DBE Supportive Services?	Yes	No
What percentage of your business does ADOT represent?	<input type="text"/>	
What percentage of your business is comprised of gov't work?	<input type="text"/>	
On what non-ADOT types of projects do you work?	<input type="text"/>	

Your Keys to Success

Please briefly identify three key drivers to company success in the next one to three years.

-
-
-

Weaknesses to Address

Please briefly identify three weaknesses that you must address to achieve future goals.

-
-
-

Preliminary Business Assessment

Your Goals/Objectives

12 month total sales goal

Annual sales goal for year three

12 month hiring goal

of ADOT projects in last 12 months

What is your bonding capacity goal?

What percentage of your business would you like to be ADOT?

What is the biggest size project you would like to obtain in the next 3 years?

Other goals you want to share:

Help for Success

Please briefly describe three to five areas wherein ADOT might help you build to greater levels of success.

1

2

3

4

5

Program Participation Outcome

What one benefit are you most seeking by participating in the ADOT Business Development Program?