



SEAN SAMSON TRAINING  
— CONTRACTING REIMAGINED —

*"Until we realize what's possible, we will always think that what we're doing right now works best"*

Sean Samson

# Scaling for Success

Contractor Discovery Questions

Please provide an updated Organizational Chart (attach via email along with this document)

Please provide your total company revenue for the last Calendar/Fiscal year:

Do you currently have a dedicated sales and/or business development professional in place now?

Yes or No

If yes, please provide the job description for this individual. (Attach via email along with this document)

If Yes, please provide the purpose as to "why" this individual was placed/hired?

Do you currently have a dedicated sales and/or business development manager in place now?

Yes or No

If yes, please provide a job description for this individual. (Attach via email along with this document)

Please provide your number of employees

Office Personnel

Field Personnel

Do you currently have a service Department?

Yes or No

If yes, please provide the following information

Number of Service Trucks

Service Employees

Please provide your total service dollars billed for your last Calendar/Fiscal year

Does your company offer Infrared Thermography?

Yes or No

If yes, please provide the level of current certification:      Level #1      Level #2      Level #3

If yes, please provide the Thermal Imaging Camera Resolution:   
(note: 320x640 for electrical inspections)

Does your company offer Ultrasonic Testing? (note: UP10000 minimum for electrical inspections)

Yes                      or                      No

If yes, has certification been awarded to the testing technician?

Yes                      or                      No

As an electrical contractor, why are you interested in selling multi-year, electrical preventive maintenance service agreements? (please be thorough):

What are the biggest challenges you face in putting this all together?

Contractor Capabilities: Please Check all boxes that apply

- De-Energized Testing & Maintenance
- Low Voltage Breaker Testing
- Medium Voltage Breaker Testing
- MV/LV Cables, Panelboards, MCC, Switchgear Testing, etc.

What does your vision of your business look like within the next (6 months) (12 months)?

6 months:

12 months:

In your opinion, what are the biggest strengths of the organization?


In your opinion, which areas of the organization seem to struggle the most?

In your opinion what sets apart your business from the competition? (Please be specific)

List in order the areas/divisions of your business that are least profitable to most profitable.

*Least*

*Most*

Is your cash flow positive each month? (If no please explain)

Please provide the average net profit margin on construction-oriented jobs over the past 2 years.

Please provide the average net profit margin on service-related jobs over the past 2 years.

Is there a current plan in place to "Cross-Sell" existing customers and/or connect with new money?

Please share your yearly customer retention strategy.

Please share your yearly customer retention rate .

When a job closes out, is there a current process in place to secure a multi-year service agreement?

List in order your company's top 5 most valuable Clients (least to most)

1.	<input type="text"/>	2.	<input type="text"/>	3.	<input type="text"/>
	4.	<input type="text"/>	5.	<input type="text"/>	

Please check which social media platform/s your company currently uses:

LinkedIn

Instagram

TikTok

Facebook

Twitter

Please share the dollar amount (if any) of your current multi-year service agreements.

\$

In your opinion (if any) please explain the differences between the two:

Reoccurring Revenue

Recurring Revenue

Please provide a percentage of where these fit within your business.

Design Build %

New Construction %

Service %

Does your sales team currently follow a step by step sales process?      Yes              or              No

If Yes please explain the process?

Please explain the system your company currently uses to forecast new business/opportunities?