



COMPETITIVE & ORGANIZATIONAL INTELLIGENCE PROFILE

Business Description	
Business Focus	
Key markets, segments	
Structure – key subsidiaries or parent company	
Key shareholders or investors, if privately held and % shares	
Size – revenues, no of employees (in context of parent, where applicable)	
Significant alliances, JVs, partnerships	
Current Plans and Initiatives	
Business Model & Changes Planned	
Company Expansion – recent and planned	
Access to capital markets or credit	
Need for capital, likelihood of sale, IPO, or other change in capital structure	
Products & Product Development	
(very) brief description of major products, what are they working on, technology acquisitions recent & planned	
Operational Capability	
Operational issues being addressed	
Quality Control & Regulatory – certifications, quality programs, corrective actions, issues, outsourced operations-what/why/results	
Delivery –resources available to meet production orders or deliver services	
Legal issues	
Recently settled	
Outstanding	



Management Team & Organizational Structure- North America & International	
Full organizational mapping: Names/title/reporting relationship(s)/detailed contact information/responsibilities/functions-areas reporting	
Tendencies/Philosophies/Risks	
Other business interests/conflicts	
Sales, Marketing & Key Account Strategies	
Key customers, Sales strategies/initiatives, Pricing, Distribution, Market Development Plans	
Customer perception	
Level of Customer Satisfaction	
Recently won business	
Recently lost business – why?	
Financial Analysis	
Key financial ratios (as available, disclosable)	
Credit Worthiness	
Financial Health - Indication of growth or decline	
Financial Risks - Indication of ongoing viability	