



XO Discovery Program Business Clients

XO Accounting wants to ensure you and your business are firing on all cylinders. To assist us with this goal we have developed our Discovery Program. The program consists of five stages:

1. The Disturbance Questionnaire - Quick questionnaire to see what keep you up at night
2. Data Gathering - Data collection to learn more about you and the issues you are facing
3. Solution - Recommendations to resolve the issues you want/need solved
4. Implementation - Implementing those agreed solutions
5. Review - Review the solutions to make sure the right results occurs

Name(s)

Do you have a business plan up that is up to date?



Is your business cashflow tracking OK?



Are you maximising your business profits?



Are you happy with the market value of your business?



Are your business debts under control?



Are you confident you can grow your business revenue?



Do you have a clear succession plan for your business?



Out of the above issues – what most keeps you up at night regarding your finances?

Accountant's Notes

Please Tick if follow up contact required?