

## Intake Application

### Greetings,

Prior to the submission of an application, the Consultant extends one phone consultation up to Five Minutes at no charge. After you have given careful consideration and desire to proceed, Potential Clients are required to go through the Intake Process. Please find the application and information relevant to the Intake appointment attached. The payment for intake services must be paid in certified funds.

### Please complete the Intake Application Disclosure and return via email to:

info@execbusinesssolutions.com or fax to 404696-4110 ext 221 and we recommend you inform your Consultant of the application status.

---

### We Recognize Your Time is Valuable

Within 24 hours, Monday through Thursday, you will receive confirmation of the application. A date and time will be scheduled for the Intake Appointments and the appointment location. You can expect a confirmation by text, email and/or phone the day before and morning of.

### Value the Time of the Consultant

When scheduling an appointment, Consultants set aside all other business and make you the focus of their attention and services. The appointment requires work to be performed in regards to the market analysis and business assessment prior to meeting with the Client. This is necessary to have current vital information which helps the client to make well informed and educated decisions about the business endeavor. This task sometimes requires hours of research and inquiries to be performed by multiple staff. We do not charge for appointment cancelations. If you cannot keep the appointment we ask for a courtesy call minimum of two (2) hours prior to the appointment. Please keep in consideration the Consultant's time and traveling expenses, as not all consultants are staffed in office. Some Consultants will be traveling to these appointments and allocating this time slot specifically for servicing your needs. Upon re-scheduling an appointment, payment would be required in advance.

### **Failure to Cancel the Office or On Site Appointment**

A payment in advance would be required to re-schedule. A fee appointment is mandatory for rescheduling if the courtesy call was not placed to the Consultant as required. The Consultant also has their own discretion in determining whether or not they choose to further engage. If the office visit was discounted, the standard price would be required, and the firm reserves the right not to reschedule, decline any payment or the rendering of services.

### **Consultancies Services Disclosure**

EBS is a consulting firm with over 17 years of expertise relevant to establishing, expanding, and reengineering businesses Clients seek to operate. As such, information provided will be supported by documentation for a review of performance demonstrations.

EBS Consultation Packages may contain: cost, rates and reimbursements based on the Industry's reported historic performances. This information is provided as a sample and does not warrant future projections. By no means is this information to serve as any form of guarantee. The information provided varies, is subject to change, and identifies the source for Client's further inquiries.

It is reported most businesses fail within the first year, largely due to the lack of funds and knowledge. The businesses of which we assist in establishing are not "GET RICH QUICK SCHEMES" and require time to grow. Be prepared in some incidents to: cut cost, offer more for less, and sub-contract, work in the industry for a period establishing a work history before securing some contracts, and invest in employee training and marketing. WE recommend when starting any business; developing a business plan having six to twelve months reserves for operating capital, become self-educated about the business, competitors, economic politics of supply, and demand.

It's our experience success comes by; Dedication, Determination, Motivation, Due-diligence, Hard work and Luck. Sadly, exhibiting all of these will not guarantee the business will succeed. Much is determined by the market, timing, economy/location, and services. Great ideas and businesses do fail. Owners can have false expectations about the outcome of services when hiring consultants, attorneys, agents, qualified staff and marketing teams, when none can affirm the results. No business is fail proof. However, many businesses triumph. Some see profits within the first year of operations and they grow into large corporations and conglomerates, creating; volumes of consumers, job securities, and profit margins that exceed expectations.

## Intake Application

3

At EBS we are committed to providing exceptional services that exceeds Client's expectations. Our objective is to assist you with accomplishing your ambition. It is our role to provide information and your role is to make the ultimate decisions. We work in concert with you to achieve a common goal. That goal is to get you in business by developing your policies and procedures, preparing applications, creating marketing materials, providing initial training, performing tasks that result in Clients obtaining a license or permit to operate, and equipping clients with the tools and skill necessary to become successful. At that point, the operations of the business are at the sole discretion of the owner.

Client Name: \_\_\_\_\_

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Consultant: \_\_\_\_\_

Consultation Date: \_\_\_\_\_

## OTHER TYPES OF CONSULTANTS

### **Fundraising and Outreach Consultants**

Fundraising and Outreach Consultants help non-profit organizations to develop an effective strategy for expanding their programs or raising money for their causes. Non-profits, such as the United Way and Red Cross, raised tens of millions of dollars every year. Consultants may identify which charity services are most beneficial to the community so that money is spent where it is needed most. These Consultants also identify the most likely group demographics of potential donors along with an enticement strategy to get their active participation in the fundraising process.

### **Efficiency Consultants**

Efficiency Consultants are experts that help corporations and non-profits to streamline their operations while maintaining the same or greater level of production or services. Some strategies may involve an increase or reduction in personnel to achieve the company's goals. Other strategies may shift employee responsibilities to increase worker output of under-performing employees and lessen a heavy burden on other employees.

### **Management Consultants**

Increasingly, Management Consultants are hired as a team. As a result, a top consultant must be a good team player. Still, these skills aren't enough; good judgment and the ability to get along with all different personality types and management styles is important. Frequently, top consultants come from top schools. Many business consultants are graduates of prestigious universities and postgraduate programs; quite often, they have years of experience. Management consultants frequently gain experience as analysts and then move out on their own to start a new company once they've established a solid network of contacts.

### **Consultancies Reengineering**

Re-engineering is generally considered when the business has the opportunity to expand services or is in trouble and something has to change in a dramatic manner and requires dramatic solutions which will require a financial investment and a completely rethinking of the way it does business. While any improvement programs can offer positive economies for a business, a modified Re-engineering program can almost always identify opportunities for improvement.

There are three basic prerequisites to beginning the re-engineering process. The business must have a clear consensus regarding the following business elements: Business Objectives, Service Objectives, Customer Expectations, and Valid Constraints.

### **Consultancies Sales**

Consultants are required to keep up to date with current market trends, and conduct our own research and development orchestration to become properly geared in helping clients reach their individual goals. Every aspect of the business objective is a major factor of consideration from the purchasing of a business to the projection of performance. This approach has grown consultants a reputation of being one of the leaders in Business, Corporate Sales, and Re-engineering.

## Appointment Confirmation

Name: \_\_\_\_\_

Additional Name (if applicable): \_\_\_\_\_

Date: \_\_\_\_\_ Scheduled Appointment Time: \_\_\_\_\_

Contact Number: \_\_\_\_\_

Thank you for contacting Executive Business Solutions and for the privilege of allowing us to provide you with professional business services. At Executive Business Solutions, we recognize how valuable you are as a client.

Executive Business Solutions is a preferred group of professionals that network comprehensively to complete our client's project. We are committed and dedicated to helping you achieve your goals.

Pursuant to the meeting, a non-refundable consultation fee for Application, Business Assessment, and Market Analysis is required in the amount of five hundred dollars (\$500); and two hundred fifty dollars (\$250) for each additional person.

## Corporate Policy

The Consultant does not directly or indirectly accept payments from: Grants, Federal or State Health Care Funded Programs (such as Medicare, Medicaid/Waiver, Veterans Administration, Tricare, etc) for contracts with a business entity. Client will not make payments to consultant from any Federal or State Grant Funded Programs for any services rendered. Payment must be made to consultant directly from the client. Client agrees to make payment in accordance with this notice and all payments are non-refundable.

No credit card or electronic payment methods accepted.

As the authorized signatory, and/or authorized responsible party, I hereby acknowledge the terms of the aforementioned agreement and agree to pay the consultation fee via certified funds (i.e.: cashier's check or money order) at the time of session.

Client Signature: \_\_\_\_\_ Date \_\_\_\_\_

Representative \_\_\_\_\_

Orientation Date \_\_\_\_\_

**I. Client Information**

Client Name \_\_\_\_\_ Cell \_\_\_\_\_

Work \_\_\_\_\_ Other \_\_\_\_\_

E-MAIL Address \_\_\_\_\_

Client Name \_\_\_\_\_ Cell \_\_\_\_\_

Work \_\_\_\_\_ Other \_\_\_\_\_

**Main Person:**

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

E-MAIL Address \_\_\_\_\_



# Intake Application

## II. Business (If Applicable)

Name of Business: \_\_\_\_\_

Type of Business: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Address: \_\_\_\_\_ Suite: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

E-MAIL Address: \_\_\_\_\_

WEB Address: \_\_\_\_\_

Is the Business Incorporated? \_\_\_\_\_ Type of Corporations? \_\_\_\_\_

Type of Payments accepted by the business: \_\_\_\_\_

\_\_\_\_\_

Year Established? \_\_\_\_\_ Are you currently a Provider? \_\_\_\_\_

# Intake Application

Type of Provider? \_\_\_\_\_/Since: \_\_\_\_\_

Are you seeking to start or re-engineer the business? \_\_\_\_\_

When? \_\_\_\_\_

Type of Business: \_\_\_\_\_

The State business is to operate: \_\_\_\_\_

Experienced in this industry? \_\_\_\_\_

How will you pay for services? \_\_\_\_\_

Do you have a budget? \_\_\_\_\_

**III. I am interested in the following Services: Please check accordingly**

New Business Start-up	Credentialing Services	
Business Expansion	Audit/Survey Preparation	
Purchasing a Business	Accreditation Assistance	
Re-Engineering	Consultation	
Corporation Establishment	Training Materials	
Health Care/Provider Agency	Training	
Compliance Assistance	Business Resources	
Application Assistance	Contract Securities	
Registrations	Coaching	
State Application Assistance	Business Plans	Business Model
Licensing/Permit Assistance		
Policy/Procedure Development	Turnkey Services	
Update/Modification of Policies	Web Design/Business Cards/Flyers	
Branding/Marketing	Grant Preparations Assistance	
Staffing Assistance	Bids/Proposals	
Product Development	Product Manufacturing/Distributions	

# Intake Application

IV. How did you hear about our services? \_\_\_\_\_

Referred by? \_\_\_\_\_

The Application, Business Assessment, Consultation and Market Analysis Fee of \$500.00 is non-refundable and due prior to the rendering of services.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

For office use only:

Intake Consultant: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### What Our Clients Can Expect

Upon payment of the initial Consultation Fee, you can expect:

#### Step 1

- Determine the Type of Business and receive consultation on services and concepts of which the business may operate
- A Business Assessment will be performed on any current or potential businesses to determine its current status and growth potential.
- The Business Assessment is an Individualized Professional and Personal Assessment that gives a greater understanding of what is required to meet the business objectives, determines qualifications, criteria, training, education or experience in its relevance and the responsibility involved to reach the goals set forth.
- A Market Analysis will provide information based on the industry's current performance, need and future projections provided by industry resources. The Consultant will assist you in evaluating the overall business. This will include future attractiveness of a market by gaining an understanding of evolving opportunities and threats as they relate to an industry's strengths and weaknesses being reported.

Below is a list of items needed to establish a contract for Consultancies' Services

#### Step 2

Corporate Qualifications for services:

- Determine the services that may be required to meet your goal
- If seeking funding; Lenders Prequalification
- Proof of Funds required if not seeking funding
- Contact the Consultant to prepare a contract
- Read the Contract for Services (exhibit A)
- Return the Original executed contract
- Retain Services and Pay the Initial Retainer (Certified Funds)
- Work with a Dedicated Processor that will coordinate all services

## To Begin the Building of your Business

Business Information:

If the Business is established:

- Secretary of State Documents
- Business Banking Information
- Licensing
- Permits
- Registrations/ Certifications/ Accreditations
- Preliminary Business Model or Plan
- Current Contracts or Purchase Orders
- Type of Services or Product
- Prototype or Sample
- Pattern/Copy or Sample
- Exemptions
- Policies & Procedures

**Please provide a general overview of what you are seeking to accomplish**

---

---

---

---

---

---

---

---

---

---

---