

Client Needs Assessment

Today's Date: _____ Business Name: _____

Contact: _____ Email: _____

Date You Would Like Work to Begin: _____

Creating goals and outlining a strategic business plan are important steps in starting and growing a business. In order for us to best address your business needs, please select from the options below the tasks or projects for that you would like CPC to assist you with. After a review of the options selected, you will be provided with a cost analysis and contract recommendation.

Business Development

<input type="checkbox"/> HUB Certification	<input type="checkbox"/> Weekly Coaching
<input type="checkbox"/> DBE Certification	<input type="checkbox"/> Business Plans
<input type="checkbox"/> Grant Research	<input type="checkbox"/> Policy Development
<input type="checkbox"/> Fact Finding Report	<input type="checkbox"/> Biweekly Coaching
<input type="checkbox"/> Program Evaluation	<input type="checkbox"/> SBA Loan Application Submission Support
<input type="checkbox"/> Outreach Engagement	
Notes/Comments	

Human Resources

<input type="checkbox"/> Management Analysis	<input type="checkbox"/> Employee Relations Training
<input type="checkbox"/> Personnel File Audit, I-9 Audit	<input type="checkbox"/> Design Employee Forms
<input type="checkbox"/> Talent Acquisition/Recruiting	<input type="checkbox"/> Succession Planning
<input type="checkbox"/> Policy & Procedure Manual	
Notes/Comments	

Credentialing

<input type="checkbox"/> Medicaid	<input type="checkbox"/> Tricare/Humana
<input type="checkbox"/> Medicare	<input type="checkbox"/> Cigna/Evernorth
<input type="checkbox"/> Aetna	<input type="checkbox"/> United Healthcare
<input type="checkbox"/> Blue Cross & Blue Shield	<input type="checkbox"/> Panel Readiness Review/Determination
<input type="checkbox"/> Other Insurance Panels	<input type="checkbox"/> Assist with CAQH ID
Notes/Comments	

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Marketing and Media

<input type="checkbox"/> Flyer Design <input type="checkbox"/> Digital Social Media Ad <input type="checkbox"/> Logo Design <input type="checkbox"/> Customer Service Survey Design <input type="checkbox"/> Branding Kits <input type="checkbox"/> Marketing Plan <input type="checkbox"/> Advanced Website w/ E-commerce Options	<input type="checkbox"/> Website Analysis <input type="checkbox"/> Market Research <input type="checkbox"/> Presentation Design <input type="checkbox"/> Marketing and Advertising Services <input type="checkbox"/> Business Card Design <input type="checkbox"/> Basic Website	
Notes/Comments		

Training

<input type="checkbox"/> Curriculum Development <input type="checkbox"/> Training Facilitation - Train the Trainer <input type="checkbox"/> Diversity, Equity & Inclusion Training <input type="checkbox"/> Grant & RFP Writing Workshops	<input type="checkbox"/> HIPAA Training <input type="checkbox"/> CARF Training <input type="checkbox"/> Joint Commission Training <input type="checkbox"/> Accreditation Training	
Notes/Comments		

Compliance & Quality Assurance

<input type="checkbox"/> Auditing (Billing, Records, etc.) <input type="checkbox"/> Appeals Submission <input type="checkbox"/> Accreditation Prep (Initial/Renewal) <input type="checkbox"/> Customer Satisfaction Survey Design	<input type="checkbox"/> Compliance Monitoring <input type="checkbox"/> Quality Assurance Plan Development <input type="checkbox"/> Annual Reports	
Notes/Comments		

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Cost Analysis:

Total if services purchased individually _____

Total if services purchased on a retainer plan _____ (Retainer + /mo. x mos.)

Plan Recommendation: A la Carte Retainer [_____]

Comments: _____

***Note:** For credentialing and similar services, there may be additional application, licensing, registration, or other administrative fees beyond the cost of CPC providing a particular service. These fees are not included in the above cost analysis quote. If additional fees are applicable, your consultant will review them in your first planning meeting.*