



***Providing Coaching and Virtual Assistant Services to Grow Your Business***

***"Your job is the excuse through which you get to love people." ~ Panache Desai***

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**Business Assessment Form for Coaching/VA(Virtual Assistant) and Marketing Needs**

I've been working as a VA for many years, but I'm not your typical VA; I'm so much more! I'm also a Transformational/Implementation Coach. My Coaching and VA services are intertwined. I'm great at helping you find your passion and purpose while generating ideas on how to monetize your calling into a career you'll love. If you do what you love, you'll never work a day in your life. I'm also a VA who provides "soup to nuts" implantation services.

I'm a coach and as such my purpose is to help people live their fullest self-actualized happy lives. I like to think of myself as your partner on your dream team making me a fully invested partner in helping you live your best life and to do the work you love. I'm an excellent problem solver, motivator, and an inspirational facilitator in creating your ideal business, and life. I'm here to help you with your Personal Development Coaching needs to help you maximize your quality of life and professional impact.

To best serve your needs, I've compiled some questions to evaluate where you are currently at in creating your ideal life. I know it's quite comprehensive but the more aware I am of who you are, and what you need the better I can serve you. As a VA and Coach, I believe your business needs to be in alignment with your highest goals, dreams, passions, values, and purpose. Please answer the following questions so that I can help you create the business and life you truly want.

**Basic Information**

Name:

Address:

Phone:

Email:

Best/Preferred way to contact you:

Company:

Website:

Type of Business:

Years of Business:

Other relevant info I may need:

**Maria Elena Escobar, CPC, VA, Writer, Web Developer, Graphic Designer**  
*Business Growth and Implementation Coach*  
*Transformation and Awakening Coach, Spiritual Illuminary and Love Catalyst*  
[ME@EmpowerYou.Love](mailto:ME@EmpowerYou.Love)  
[www.EmpowerYou.Love](http://www.EmpowerYou.Love)



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### **Tell Me About Your Business**

Tell me a bit about your business as it stands today.

Do you have a mission statement or clear vision statement for your business? If yes, what is it?

What are you most proud of since starting your business?

What is it that you do? What service or products do you provide?

Why is it that you do what you do? What is most important to you about your work?

What are your favorite parts of the business? What parts of your business do you find most challenging?

What is your greatest strength and weakness related to your business?

In what ways do you feel stuck regarding growing your business or achieving your life goals?

In six months from now, where do you want to be regarding your business and lifestyle? What are the three biggest things you want to feel like you've accomplished/achieved? In three months? Six months? A year? Long-term?

What are the three biggest changes you want to make in your life over the next five years? How does achieving your business goals tie into these life goals or changes you want to make personally?

What are you most looking forward to during our time together? (It's going to be FUN!)

Do you have any relevant certifications, training, expertise, etc. that could be helpful to know?

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**Tell Me About You, Where You Are At Now and Where You Want to Be**

If anything was possible what would be your wish?

What have been your three greatest successes to date?

What is the greatest challenge you have had to overcome?

What major changes have you faced with over the last couple of years?

What is most important to you in your life and why?

Who are the most significant people in your life – what do they provide you with that serves you best?

Is your life one of your choosing? If not, who is choosing it for you? Are you living by default or design, please explain?

On a Scale of 1-10, how happy do you feel in your business most days? (10 is "I absolutely love it," and 1 is "I am miserable!") On a scale of 1 -10, how happy are you with your life right now? What are the things that make you happy? Why?

On a scale of 1-10, how motivated are you in your work/personal life? What motivates/demotivates you? Why?

On a scale of 1 -10, how stressed do you feel right now – what are your key stressors? Why?

List 5 things that you feel you are 'putting up with' or things that frustrate you right now?

Are there any personal areas that you believe you would benefit from receiving life coaching to aid you in attaining your goals and relieving your frustrations?

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### **Tell Me About Your Marketing/VA Needs and Goals**

What VA services do you most need assistance? (For example Website management/creation, social media, funneling clients, marketing, graphics, creating products/programs, etc.) Are you tech savvy? Do you wish to learn how to manage things or would you prefer to delegate? What is your budget for marketing and technical assistance?

Who do you have on your team, i.e., Web developer, Graphic Artist, etc.?

What programs, software, products, systems, and tools do you currently have in place? (For example Software, CRM's, Email marketing providers, Social Media, Website, Membership programs, Products, Freebies, Funnels, etc.) Who do you use for your online services, i.e., Website Hosting Company and other service providers?

How big is your client base/list? Do you have a social media following and/or email list? Which platform is your biggest performer/converter/funnel?

Can you clearly articulate your niche? Who are your target customers? How would you define your ideal client? Who is she/he and what do she/he struggle with, what is their biggest pain point, frustration or unmet needs? Where do they hang out? For example what social media platforms they use most, what activities and real-life places do they frequent, how do you find them to market to them? How do you currently get your clients? What is your current promoting strategy?

What are the key elements of your ideal marketing plan? What do you wish to accomplish through marketing? What have you tried and are doing currently? What has and hasn't worked for you?

What is your conversion strategy? How successful is it? Do you need help closing or funneling clients? How is your client retention? Do you have a retention strategy?

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What is your current Online Marketing strategy and what would you like to add to it? (i.e., Keywords, SEO, Paid Ads, Social Media, Blogging, Webinars, Networking, etc.?) Do you have a referral or affiliate strategy? Have you or are you planning any joint ventures?

Do you do public speaking, writing or live events to get customers? Do you have brick and mortar business or just an Online Presence?

Do you have a clear Brand? Do you have a preference in style, i.e. clean and modern vs. traditional look in your media and correspondence? For example, a font like "Arial" may be your go-to preference, or you may have a color scheme you gravitate to most?

What is your Unique Selling Proposition (USP), do you have catchphrase or slogan? Having a strong, unique selling proposition (USP) is of critical importance as it distinguishes your company from competitors. The hallmark of several great companies is their USP. For example, FedEx's (USP) of "When it absolutely, positively has to be there overnight" is well-known and resonates strongly with customers who desire reliability and quick delivery.

Do you have a Products/Services/Offer distribution plan? Your distribution plan details how customers will buy from you. For example, will customers purchase directly from you on your website? How will people pay? Do you have tiers in your plan, i.e., coaching membership levels?

What is your Pricing & Positioning Strategy?

Your pricing and positioning strategy must be aligned. For example, if you want your company to be known as the premier brand in your industry, having too low a price might dissuade customers from purchasing.

Is there anything I've missed you think is relevant?

**Thank you for helping me serve you better!**

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