



## Due Diligence

### Potential International Regional Partners/Partner Owners

Thank you for your interest in working with The David Allen Company. As the popularity of Getting Things Done and the GTD Brand continues to grow, we are looking for great people and great companies who can support demand in various regional markets.

We appreciate your taking the time to complete the form below. Your responses will be helpful to us in terms of us better understanding your business, business strategy and capabilities and how those are aligned with our company.

You may answer the questions in this document in its digital pdf form. Just click in the fields beneath each question and your cursor should appear. You may also print it out as is and fill it in. When completed, please return the document to us by email, fax or regular mail.

Thank you,

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**Name of Firm:**

**Contact Person(s):**

**Services**

1. What are your major services? What were the general revenues associated with each major line of service?

**History/Finance**

2. How long have you been in business?

3. How is your firm organized (private, partnership, etc...)?

4. How many full time employees? Part time? Contractors or affiliates?

5. How long has this staff been with you?

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6. What are their qualifications?

7. Do you have any licensing or affiliate relationships with other firms? If so, whom?

8. What were your revenues for each of the past 3 years (2005-2007)?

### **Motivation**

9. Why are you interested in affiliating with The David Allen Company?

10. What do you know about The David Allen Company?

11. How would an affiliation with The David Allen Company complement your existing business?

12. What has been your primary strategy for your business for the last three years? What is it for 2008/2009?

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## Marketing & Sales

19. What is your stated value proposition?

20. How do you reach your customers?

21. What is your budget for marketing and/or what are your marketing activities?

22. How do you sell your services? How big is your sales force?

23. Who are your biggest competitors?

24. How do you differentiate your firm from them?

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## Operations

25. How do you run your operation in terms of coordinating logistics, sites, materials etc...?
26. Do you run public seminars? If so, how many per year? How many attendees/participants (on average) per seminar?
27. Do you run in-house seminars? If so, how many per year? How many attendees/participants (on average) per seminar?
28. What are your resources for producing print materials, workbooks, etc..?
29. How do you develop new services/products?

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