

Office Central

A Division of WorkPlace Dynamics, Inc.

This needs assessment was developed to give you and us a better idea of the services you may require. The information collected will only be used as a baseline to determine what services should be provided through a letter of agreement. All information collected will be held in the utmost confidence and not revealed without your prior consent.

Simply download this assessment, complete the questions and return to us with your contact information either by email or fax and someone from our office will contact you.

Contact Name _____

Company _____

Address _____

Phone _____

Fax _____

Email _____

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Needs Assessment

Bookkeeping - The Bookkeeping services provided by Office Central can be held either on-site or off-site. These services are tailored for both businesses and individuals. All aspects of bookkeeping are covered through financial statements.

What is your legal structure (partnership, sole proprietor, C-Corp., S-Corp, Etc.)?

How many checks do you write per month?

How many deposits do you make per month?

How many items make up, on average, each deposit?

What type of financial information do you need and how often do you need it?

Is your current system manual or computerized?

What system do you currently use?

Do you need your bookkeeping physically done on-site or can it be done off-site?

How much time are you currently spending each week doing bookkeeping functions?

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Tax Planning - Office Central is your solution for all of your tax needs! Taxation services are available for individuals, corporations, trusts, estates, partnerships and non-profits.

Many people believe that the chief tax function is to prepare tax returns at year-end. While this is certainly part of it, we view the tax return as a benchmark of the positive results of proper year long planning. Because we take the time to build a relationship with you we are able to understand and be aware of issues and concerns that are of an ongoing importance to you. Good ideas to help you plan emerge from this relationship and are put into place as good practices. We take a proactive approach to tax planning all year. We encourage you to view our tax planning services as an essential part of your personal and business finances. It's the kind of relationship that will yield the best results!

What is your current tax filing status?

Do you currently do tax planning?

Do you wish to do proactive or reactive tax planning?

How many times per year do you currently do tax planning?

How many times per year would you like to do tax planning?

Will Office Central, a division of WorkPlace Dynamics, Inc., be providing your bookkeeping services or will someone else be providing it?

Will Office Central, a division of WorkPlace Dynamics, Inc., be providing your tax return preparation or will someone else be providing it?

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DataBase Management - Let us provide for your database needs! Office Central assists in the creation, maintenance and organization of your database. Databases can be tailored to any business, large or small. For example a leads and sales database for a small business, a fundraising database for a non-profit organization, or national database for an international corporation.

Are looking to create, manage (or both) your database?

How many entries do you currently have in your database?

How many entries are you looking to add to your current database?

Do you wish to have your information verified (i.e. have the address & phone numbers verified? Just the addresses? Need email addresses)?

Will you be pre-planning mailings to be sent during the year to this database?

Do you need assistance in planning these mailings?

Would you like to automate your mailing process?

What type of information do you wish to keep track of?

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Secretarial Services - Office Central caters to your secretarial and word processing needs. We help with the clerical duties in your office as well as providing services in event planning and document preparation. Office Central assists with your outside events by organizing your meetings to include notifying members, making facility arrangements and by handling registration and payments. We assist with your internal programs by helping with the design and implementation of employee programs for events such as employee recognition, annual meetings, and regular training needs. Office Central can also help you with writing internal and external documents. Services include setup, proofreading, editing and mailings.

What type of secretarial services do you need? (i.e. filing, letter creation, editing, etc.)

How many of these services do you need performed or created each week?

If you need filing, is your system set up or do you need assistance in setting up a system?

Do you need assistance in event planning?

If yes, what type of assistance will you require? (i.e. creation of invitation, scheduling of facility, mailing of invitations, etc.)

What other needs or comments do you have?