

The Close Method™ presents

Fundability Positioning Audit™

Pre-Intensive Diagnostic Workbook

This workbook is designed to help you evaluate how your business is currently positioned for credibility, funding, and long-term growth.

Complete this audit before attending the Fundability Intensive so you arrive prepared to evaluate your current structure and identify what may be blocking your next level.

Created by

Kelly Thomas

CEO & Founder

The Close Method™

Before You Begin

This workbook is not about perfection.

It is about clarity.

Most business owners are not denied funding because they are unqualified.

They are denied because something in their structure, credibility, or positioning signals risk.

This audit will help you identify:

- What is already working
- What may need improvement
- Where your business positioning may be breaking

Answer honestly.

This evaluation will help guide our work during the Intensive.

Section 1

Business Foundation

Your business foundation tells lenders and partners whether your company is organized, legitimate, and stable.

Answer the following:

1 Business Structure

What is your current business structure?

- LLC
- Corporation
- Sole Proprietor
- Not registered yet

Business name:

State registered in:

Year established:

2 Business Identity

Do you currently have:

- EIN from the IRS
- Business bank account
- Professional business email
- Business phone number
- Business address (not personal)

Which items are missing?

Reflection

Do you believe your business currently looks credible on paper?

Why or why not?

Section 2

Financial Credibility

Lenders evaluate how well a business manages its finances and obligations.

This section helps identify what financial signals your business is currently sending.

1 Banking Activity

How long have you had your business bank account?

- Less than 6 months
- 6–12 months
- 1–2 years
- 2+ years

Do you run most of your business income through this account?

- Yes
- No
- Sometimes

2 Business Expenses

Do you currently separate business and personal expenses?

- Yes
- No

Do you track your business income and expenses?

- Yes
- No

Reflection

What financial habits could improve your business credibility?

Section 3

Lending Position

Many businesses believe they are ready for funding but are missing critical signals lenders evaluate.

This section identifies how prepared your business may be for funding opportunities.

1 Business Credit

Do you currently have any business credit accounts?

Yes

No

If yes, list them:

2 Credit Visibility

Do you know if your business appears in:

Dun & Bradstreet

Experian Business

Equifax Business

Unsure

Reflection

If a lender reviewed your business today, what concerns might they have?

Section 4

Strategic Readiness

Funding alone does not grow a business.

Strategic positioning determines whether funding actually creates leverage.

1 Business Direction

Which best describes your current stage?

- Just getting started
- Building structure
- Generating income
- Scaling operations

2 Growth Goals

What is your primary goal for the next 12 months?

Reflection

What do you believe is the biggest thing holding your business back right now?

Final Reflection

After completing this audit, what stands out most about your current business positioning?

Bring This With You

Bring your completed workbook to the Fundability Intensive.

We will use this evaluation to help identify:

- Structural improvements
- Credibility signals lenders evaluate
- Strategic positioning opportunities

This is where clarity begins.

