

We invite you to participate in the 2017 Deloitte Cincinnati USA 100 survey



The Deloitte Cincinnati USA 100 program recognizes the top 100 privately held businesses in the marketplace

Qualifications

To qualify for the 2017 Deloitte Cincinnati USA 100, your company must meet the following criteria:

Company location

Must be headquartered in one of the following 18 counties in the Tri-state area:

- Ohio – Adams, Brown, Butler, Clermont, Clinton, Hamilton, Highland, Preble, Warren
- Kentucky – Boone, Campbell, Carroll, Gallatin, Grant, Kenton, Pendleton
- Indiana – Dearborn, Ohio

Revenues

Companies are ranked by annual gross revenue. If a parent company, please submit a combined revenue figure which includes subsidiaries. Do not submit separate forms for each subsidiary. Please eliminate those revenues which reflect intercompany sales. Group results of this survey will be published to denote trends and highlights. Revenue information will be published only with your consent.

Ownership

Must be privately held (i.e., a company whose voting stock is family-held, employee-owned, or owned by individuals and not listed on an exchange or actively traded over the counter). For companies owned in part or in whole by another privately held company, the headquarters/operations of the company must be located in one of the 18 counties listed above. Accounting, tax, and legal services companies are excluded.

Survey Instructions

Please make the appropriate selections where indicated and include other responses as designated.

- Note that page one has a number of required fields and you will be unable to continue to the rest of the survey until they are completed.
- You are able to save responses and return to the survey to continue before final submission. Please **make note of the provided URL when the survey is saved**, so you can return to your responses.
- When your completed survey is submitted, your responses will be displayed with an option to **print for your records**.
- To view a complete version of the survey, visit www.deloitte.com/us/cincinnati100.

Completed surveys are due **August 15, 2017** and can be submitted by any of the following methods:

- Complete this online survey (preferred)
- Fax responses to 513.362.6239
- Mail responses to: Deloitte Cincinnati USA 100, 250 E 5th Street, Suite 1900, Cincinnati, OH 45202
- If you have questions as you are completing the survey, please contact Xiomara Lopez at 617.437.3294 or xilopez@deloitte.com



By completing this survey, I understand that any data or information provided by me as part of this survey may be used by Deloitte in connection with this survey, other studies, or analyses performed by Deloitte or in connection with services provided by Deloitte or otherwise. I understand that this survey and the survey results are the proprietary property of Deloitte. I understand that any such data or information may be disclosed by Deloitte to related entities or other third parties, including, without limitation, in publications, in connection with this survey or such studies, analyses, or services provided that such data or information does not contain any information that identifies me or associates me with the responses I have provided to this survey. I understand that in event that my company is selected as a winning company, Deloitte will disclose information describing my company including: ranking within the Deloitte Cincinnati USA 100, top executive, number of employees, business description, headquarter location, web address, year founded, if the company is family-owned ("Basic Information"), and will attribute the Basic Information to me or my company. Deloitte will keep my Gross Annual Revenue information confidential, unless I provide Deloitte with permission to disclose such information by responding accordingly to question number five in the survey. I understand disclosure of survey data or information may be required by law, in which case Deloitte will endeavor to notify me. Deloitte is not, by means of this survey or the survey results, rendering professional advice or services to me or my company. Neither this survey nor the survey results is a substitute for such professional advice or services. Deloitte is not responsible for any loss sustained by any person who relies on this survey or the survey results. I am authorized to complete this survey on behalf of my company and to receive the survey results, including, without limitation, in accordance with the policies of my company, its board of directors (or similar governing body), and, if applicable, its audit committee.

**By participating in this survey, I agree to the statements above.
If you do not agree with the statements above, do not participate in this survey.**

Company information

01. Please provide general company information as you would like it to appear in event publications.

Company Name	Telephone
Address	Company web address
	Year founded
	DUNS number
City	
State	
Zip/Postal code	

02. In which county is your company headquartered?

- | | | |
|--------------------------------|--------------------------------|---------------------------------|
| <input type="radio"/> Adams | <input type="radio"/> Highland | <input type="radio"/> Gallatin |
| <input type="radio"/> Brown | <input type="radio"/> Preble | <input type="radio"/> Kenton |
| <input type="radio"/> Butler | <input type="radio"/> Warren | <input type="radio"/> Grant |
| <input type="radio"/> Clermont | <input type="radio"/> Boone | <input type="radio"/> Pendleton |
| <input type="radio"/> Clinton | <input type="radio"/> Campbell | <input type="radio"/> Dearborn |
| <input type="radio"/> Hamilton | <input type="radio"/> Carroll | <input type="radio"/> Ohio |

03. Contact information (e-mail addresses will not be shared publicly)

Name	Title	E-mail
Person completing the survey		
Top financial executive		
Top executive		
Other executive (Optional)		

04. Annual gross revenue: Please provide revenues for the two most recent fiscal years completed prior to July 1, 2016.

- Examples:
- Companies with a June 30 year-end should provide 06/30/2015 and 06/30/2016 financial information.
 - Companies with a December 31 year-end should provide 12/31/2014 and 12/31/2015 financial information

Most recent fiscal year: Revenue _____ Financial statement date _____

Prior year: Revenue _____ Financial statement date _____

05. Do we have your permission to disclose your company's revenues to Enquirer Media for inclusion in their newspaper's listing of the Deloitte Cincinnati USA 100 companies?

- Yes No

06. What is the primary business of your company?

- | | |
|------------------------------------------------|---------------------------------------------------------|
| <input type="radio"/> Retail/Distribution | <input type="radio"/> Health Care/Life Sciences |
| <input type="radio"/> Automotive retail | <input type="radio"/> Media and Entertainment |
| <input type="radio"/> Consumer Products | <input type="radio"/> Technology and Telecommunications |
| <input type="radio"/> Manufacturing | <input type="radio"/> Transportation/Logistics |
| <input type="radio"/> Construction/Engineering | <input type="radio"/> Business/Professional Services |
| <input type="radio"/> Real Estate | <input type="radio"/> Other (please specify) _____ |

07. Description of your business

08. Describe the legal form of your business.

- | | |
|-------------------------------------|-------------------------------------------------------|
| <input type="radio"/> C-corporation | <input type="radio"/> Limited liability company (LLC) |
| <input type="radio"/> S-corporation | <input type="radio"/> Partnership |

09 A. Which category best describes your company's ownership?

- | | |
|--------------------------------------------------------------------------------|------------------------------------------------------------|
| <input type="radio"/> Family owned | <input type="radio"/> Private equity investment firm (PEI) |
| <input type="radio"/> Employee owned/ESOP | <input type="radio"/> Other _____ |
| <input type="radio"/> Closely held (excluding family owned and employee owned) | |

09 B. Describe your company's private equity ownership.

- Wholly owned by private equity firm(s)
- Partially owned by private equity firm(s)
- Not private equity owned Private equity investment firm (PEI)

09 C. Please list the private equity firm(s) with ownership in your company.

10. Is your company certified as a minority-owned and/or woman-owned business (MWBE)?

- Yes
- No
- Don't know/not sure

11. Who are your business' primary advisors?

Accounting/Audit firm -----

Tax provider -----

Law firm -----

Bank -----

Other -----

12. Number of full-time equivalent employees (as of financial statement date)

A. Number of people employed on a full-time equivalent basis -----

B. Number of people you employed on a full-time equivalent basis one year prior -----

13. Locations

A. In how many states does your company have facilities? -----

B. In how many states does your company have customers? -----

C. In how many countries does your company have facilities? -----

D. In how many countries does your company have customers? -----

14. Over the last fiscal year, how have the following changed?

	11+%	Decrease 6-10%	1-5%	Stay the same	1-5%	Increase 6-10%	11+%	NA
Gross sales/revenue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pretax profit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Full time headcount	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health care costs/employee benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labor costs (wages/salaries)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operating costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SG&A	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Capital expenditures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
R&D investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/advertising/social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. In the next fiscal year, how do you expect the following to change?

	11+%	Decrease 6-10%	1-5%	Stay the same	1-5%	Increase 6-10%	11+%	NA
Gross sales/revenue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pretax profit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Full time headcount	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health care costs/employee benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labor costs (wages/salaries)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operating costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SG&A	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Capital expenditures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
R&D investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/advertising/social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Current business environment

16. Which of the following measures by the U.S. Federal government would most help U.S. mid-sized businesses to grow in the next year? (Select up to three)

- Reducing corporate tax rates
- Rolling back health care reform
- Supporting increased infrastructure investment
- Protecting U.S. firms better from global competition
- Subsidizing vocational and other skills training and development
- Relaxing export/import regulations
- Keeping interest rates low
- Easing bank lending practices
- Stimulating private consumption
- Easing immigration restrictions
- Other _____

17. At what pace do you expect the U.S. economy to grow over the next 12 months?

- Grow robustly: 5% or more
- Grow above trend: 3.5% - 5%
- Grow moderately: 2% - 3.5%
- Grow slightly: 0% - 2%
- No growth: 0%
- Negative growth

18. Which of the following areas of proposed tax form would most significantly impact your business?

- Boarder adjustment tax
- Lower domestic rates
- Elimination of interest expense deduction
- Full write-off of capital expenses
- Entity level tax on flow-through entities

19. How does your optimism regarding your company compare to last year?

- More optimistic, primarily due to external factors (e.g., economy, industry, market trends)
- More optimistic, primarily due to internal/company-specific factors (e.g., products/services, operations, financing, assets)
- No notable change
- Less optimistic, primarily due to external factors (e.g., economy, industry, market trends)
- Less optimistic, primarily due to internal/company-specific factors (e.g., products/services, operations, financing, assets)
- Full write-off of capital expenses
- Entity level tax on flow-through entities

20. Are you confident that your company will outperform your competition in the next 12 months?

- Very confident
- Somewhat confident
- Not very confident
- Not at all confident

21. Which of the following explains your level of confidence toward your company outperforming its competition in the next 12 months? (Select all that apply)

- Strength of market position
- Strength of brand
- Effectiveness of business strategy
- Ability to execute against business strategy
- Quality of products or services
- Focus on innovation
- Ability to attract and retain a skilled workforce
- Ability to plan for and manage risk
- Financial fundamentals
- Effectiveness of customer engagement
- Other _____

Revenue growth

22. How important are the following strategies to position your company for growth?

	Not important	Somewhat important	Very important	Critical to success	Not applicable
Acquire new customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retain and grow existing customer base	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enter new domestic markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enter new international markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grow through acquisition/forming joint ventures or strategic alliances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better leverage income-generating assets (e.g., intellectual capital)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Focus on new product or service innovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strengthen pricing strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduce prices to gain market share	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing/advertising/social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. What are your company's main obstacles to growth? (Select up to three)

- | | |
|---------------------------------------------------------------|-----------------------------------------------------------------------|
| <input type="radio"/> Government budget cuts | <input type="radio"/> Recruiting and retaining talent/skills shortage |
| <input type="radio"/> Lack of resources/capital for investing | <input type="radio"/> Raw materials/input costs (incl. energy) |
| <input type="radio"/> Health care costs | <input type="radio"/> Increased regulatory compliance |
| <input type="radio"/> Increased competition | <input type="radio"/> Tax constraints |
| <input type="radio"/> Environmental issues | <input type="radio"/> Ineffective risk management capabilities |
| <input type="radio"/> Globalization | <input type="radio"/> Ineffective customer engagement |
| <input type="radio"/> Weak market demand | <input type="radio"/> Cost of keeping up with technological advances |
| <input type="radio"/> Uncertain economic outlook | <input type="radio"/> Other _____ |

24. How confident are you in your ability to successfully address the obstacles you indicated above?

- | | |
|------------------------------------------|--------------------------------------------|
| <input type="radio"/> Very confident | <input type="radio"/> Not very confident |
| <input type="radio"/> Somewhat confident | <input type="radio"/> Not at all confident |

25. What are your company's top two investment priorities in the next 12 months? (Select two)

- Development of new products and services
- Hiring and training
- Technology - upgrading existing systems
- Technology - implementation of new systems
- Capital expenditures
- M&A
- Other _____

26. What portion of your company's revenues comes from outside the United States?

- None
- Up to 20%
- 21% - 40%
- 41% - 60%
- 61% - 80%
- 81% - 100%

27. In which geographic markets do you currently conduct business or plan to enter/expand presence in the next three years?

	Currently conduct business	Plan to enter or expand presence within next three years
Asia Pacific (excluding China and India)	<input type="radio"/>	<input type="radio"/>
China	<input type="radio"/>	<input type="radio"/>
India	<input type="radio"/>	<input type="radio"/>
Europe	<input type="radio"/>	<input type="radio"/>
Mexico/Central America	<input type="radio"/>	<input type="radio"/>
South America	<input type="radio"/>	<input type="radio"/>
Middle East/Africa	<input type="radio"/>	<input type="radio"/>
United States/Canada	<input type="radio"/>	<input type="radio"/>

28. How likely is your company to participate in a merger/acquisition in the coming year?

	Highly unlikely	Not likely	We are not looking, but would consider a deal	Quite likely	Very likely	Unsure
Participate as an acquirer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Divest a piece of the business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sell the entire entity (merger target)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Information Technology and Innovation

29. Rank the effectiveness of the following regarding the management reporting information available to your decision makers.

	Poor	Fair	Good	Excellent	N/A
Timeliness of needed information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reliability/quality of information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relevance and accuracy of available reports/dashboards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Depth and breadth of information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to leverage information between departments, locations, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of predictive data to provide insights into the future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

30. Which investment in technology is your company likely to make in the next 12 months? (Select up to three)

- Cloud computing/software as a service
- Enterprise application suites
- Data analytics/business intelligence
- CRM
- Automation of business processes
- Other _____

31. How would you describe your organization’s level of maturity with regard to the following?

	Not implementing	Piloting	Early state implementation	Used in certain departments	Used broadly, but unsure of ROI	Delivering value throughout the organization
Analytics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cloud infrastructure/ applications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

32. What is the biggest IT challenge faced by your organization?

- Keeping up with new technology
- Not having the right talent/skill set
- Tactical hurdles
- Understanding ROI
- Budget to implement new technology
- Information security
- Strategic direction/leadership consensus and support
- Other _____

33. What is your company's current "spend" on technology-related labor and benefits as well as outside consultants (excluding hardware)?

- We do not currently have a separate, identifiable spend
- Less than 1% of revenues
- 1% - 1.5% of revenues
- 1.5% - 2% of revenues
- 2% - 2.5% of revenues
- 2.5% - 3% of revenues
- 3% - 3.5% of revenues
- 3.5% - 4% of revenues
- Above 4% of revenues

34. What is your company's current spend on technology-related hardware and software cost?

- We do not currently have a separate, identifiable spend
- Less than 1% of revenues
- 1%-1.5% of revenues
- 1.5%-2% of revenues
- 2%-2.5% of revenues
- 2.5%-3% of revenues
- 3%-3.5% of revenues
- 3.5%-4% of revenues
- Above 4% of revenues

35. Which of the following disruptive trends do you think will have the most significant impact on your business in the next 12 months?

- Additive manufacturing/3D Printing
- Wearable technology
- Internet of Things (IoT)
- Artificial intelligence
- Robotics
- Blockchain
- Virtual reality
- Augmented reality

36. What do you believe to be the main barriers or constraints on innovation within a business setting? (Select up to three)

- Attitudes/outlook of senior management e.g., not willing to take risks or accept/learn from failure
- Channels of communication - flow of information and ideas between all levels of employees
- Complacency e.g., relying on existing products and services, sticking to old ways of working
- Employees' skills/level of education
- External factors e.g., competitor threat, economic conditions, regulation
- Financial barriers e.g., lack of investment in research and development
- Lack of employee diversity e.g., everyone of similar age, gender or ethnic background
- Lack of formal innovation processes or practices e.g., using internal or external competitions to stimulate new ideas
- Lack of teamwork/rewarding individuals not teams
- No eye on the future/do not monitor significant changes in sector
- Organizational structure
- People's contribution to innovation is not incentivized or considered in performance reviews
- Poor staff attitudes e.g., laziness, lack of respect for others
- Pressures of deadlines, no time to think
- Too inward looking; not seeking alliances with other businesses, universities, etc.

Human Resources

37. Rank the three people management issues that are most critical to your organization's success.

[Place a 1, 2, or 3 next to each of your top choices (1 = Top; 2 = Second; 3 = Third)]

<input type="checkbox"/>	Leadership development	<input type="checkbox"/>	Compensation, benefits, and pension planning and management
<input type="checkbox"/>	Talent management	<input type="checkbox"/>	Improving operational efficiency of HR through processes and technology improvements
<input type="checkbox"/>	Creating a high-performance culture	<input type="checkbox"/>	Other
<input type="checkbox"/>	Training/development	<input type="checkbox"/>	

38. Please indicate the level of difficulty in finding qualified candidates when hiring.

- Very difficult
- Somewhat difficult
- Somewhat easy
- Very easy

39. What is the most significant step your company is taking to secure the talent it needs over the next five years?

40. How much does your company spend annually on leadership development?

- Less than \$20,000
- \$20,000 - \$50,000
- \$50,000 - \$100,000
- \$100,000 - \$200,000
- More than \$200,000

41. Rate the quality of your executive level depth and your effectiveness in leadership succession planning.

- Poor
- Fair
- Good
- Excellent

42. At what point do you foresee a change/succession in executive management?

- Within 5 years
- 10 years
- 15 years
- Unsure

Expectations (company strengths/ownership concerns)

43. When your company prepares a strategic business assessment, do you analyze the following? (Select all that apply)

- Competitors
- Customers
- Capital needs
- Markets served
- Leadership and succession
- It has been more than two years since we prepared a strategy assessment
- We do not prepare strategic assessments

44. How important are the following concerns to the principal owners of your company?

	Not important	Somewhat important	Very important	Critical to success	Not applicable
Corporate structure/governance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enterprise risk management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effectiveness of internal controls over financial reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company/stock valuation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management succession planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exit strategy/ownership transition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estate planning/wealth management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Charitable giving/civic volunteer work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental and social responsibility/going green	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce diversity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

45. Please answer the following questions regarding corporate governance.

	Yes	No	NA
We have a formal independent board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have an advisory board	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Majority of board/advisory members are non-family and non-management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a family council to align family interests with corporate interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We require ongoing board education sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have an internal audit department	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

46. How much are your company's board members compensated per quarter/meeting?

- Less than \$1,000
- \$1,000 - \$2,500
- \$2,500 - \$5,000
- More than \$5,000
- We do not compensate board members
- We do not have a board

47. In considering your company's future, which option is most likely?

- Initial Public Offering (IPO)
- Sell to strategic buyer/private equity investor
- Management buyout
- ESOP
- Pass to family member(s)
- Other _____

48. At what point do you foresee the ownership change indicated above?

- Within 5 years
- 10 years
- 15 years
- Unsure

49. Which EXTERNAL risks most concern your management and board? (Select up to three)

- Economic slowdown/recession
- Unfavorable interest rates
- Unfavorable equity markets
- Competition
- Disruptive innovations/technologies
- Unfavorable commodity prices
- Tax policy or regulatory change
- Cyber threats
- Hazard or other catastrophe

50. Which INTERNAL risks most concern your management and board? (Select up to three)

- Selection/execution of initiatives
- Number of initiatives/prioritization of efforts
- Ability to execute on strategy
- Operations failure/disruption (downtime, input shortage)
- Compliance issue
- Product/service liability/lawsuit
- Ability to innovate
- Information leak
- Failure to meet financial demands
- Quality/timeliness of information
- Loss/succession of executives
- Loss of other key talent
- Leadership disagreement/friction

Local issues

51. How would you rate business conditions in the Cincinnati USA area?

- Poor
- Fair
- Good
- Excellent

52. Comments

53. What do you believe Cincinnati needs to do to attract new business and talent? What are our biggest challenges today?

54. Please provide any additional comments about your company, any of the issues covered in this survey, or topics to be considered for future surveys?

Thank you for completing this survey



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