



BIG Marketing Solutions

419-764-9649

Client Discovery Questionnaire

Note: Some Questions May Not Be Relevant For Your Particular Business. You May Skip Those You Do Not Feel Are Relevant, But The More Information You Provide, The More Likely We Can Produce The Results You Desire.

Date Completed _____

Legal Name of Business and Organization (Corp, LLC, Sole Proprietership, etc.)

Tag Line Or Slogan ? _____

Physical Address: _____

Best Phone # And Email Address:

Years In Business: _____

Have You Worked With A Marketing Company Or Consultant Before? Past Experience
Good Or Bad? Fears? Hopes? Any Questions Or Concerns?

What Is Your Elevator Pitch, A 30 Second Or 1 Minute Description Of What You Do That You Would Share With A Person Who May Need, Or Know Somebody Who Needs Your Help That Would Make Them Want To Know More?

List Key Elements Of Pride, Favorite Success Stories For Your Business

List Any Particular Failures Or Efforts That Did Not Go Well That You Might Like To Revisit Or Want To Avoid In The Future? Lessons Learned?

What Are The Primary Immediate Business Needs Or Goals / Short Term (Up To 1 Year)

What Are Your Long Term Goals For 2, 3, 4, 5 Years From Now?

List Important Products / Services, Eg: Seller Services, Buyer Services, Other Services
Product / Service / Or Category Percent Of Sales / Priority For Future Growth

List Most Important Geographic Area Served, Cities You Would Like To Target, Counties, States, Countries

In Terms Of Personality, Lifestyle Or Demographics – Who Is Your Ideal Client? Who Do You Work Best With? Who Is Most Able To Pay What Your Products Or Services Are Worth?

Are There Any Client Types Do You Want To Avoid?

What Are Some Of The Ways Customers Or Clients Find You At Present? Please Include Notes About Which Ways Work Best? Which Ways Cost The Most? Which Ways Cost The Least? Which You Want To Increase? Any You Want To Decrease?

What Is The Typical Sales Process/Cycle? Eg: Customer Visits Web Site, Or Calls, Or Fills Out A Form, Requests Free Or Paid Appointment, Requests Consultation And Advice Before Making Buying Decision, Or Customer Or Visits Location And Makes Self Service Selection From Existing Products And Services, Other?

Which Sales Process Is Most Preferable Or Most Desired In The Future?

Do You Offer Any Special Promotions To New Customers? If So, What Are They?

Who Is Your Primary Competition? How Do They Attract Customers? Why Would Customers Choose Them Instead Of You?

Why Would Your Customers Choose To Buy From You Over Your Competitors?

What Is The Experience And Expertise Of The Company With Regard To Marketing – Formal, Informal, Traditional Or Online?

Do Have Preferred Marketing Colors, Fonts, Imagery, Logo(s), Sales Copy? Please Describe

How Much Attention Have You Devoted To The Following Marketing Issues? Please Rank From 1-10 With 1 Being None And 10 Being Extensive Work:

Annual Marketing Plan _____ Customer Acquisition Strategy _____

Branding _____ Imaging _____ Identity _____ Positioning _____

Value Proposition _____ Messaging _____ Advertising And Promotion _____

Which Issues Do You Most Want To Work On In The Future? Rank From 1-10 With 1 Being None And 10 Being Extensive Work:

Annual Marketing Plan _____ Customer Acquisition Strategy _____

Branding _____ Imaging _____ Identity _____ Positioning _____

Value Proposition _____ Messaging _____ Advertising And Promotion _____

Marketing And Advertising Channels Used

Please Circle And Make Notes Regarding What Business Generating Methods You Have Used Or Are Using. For Each Answer - Why Or Why Not?

<u>Method Tried</u>	<u>Worked</u>	<u>Failed</u>	<u>Current</u>	<u>Desired</u>	<u>Notes</u>
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Radio

Television

Print

Direct Mail

Advertising

Publicity

Video

Internet

Social Media

Seminars

Networking To
Build Referrals

Word Of Mouth

Other ?

Notes:

Current Annual Marketing / Advertising Budget Current Budget And Distribution Across Marketing Mix

What Is The Average Value To You Of A Customer (Sales And Profit)?

Lifetime Value Of Your Average Customer? (Any Referrals Or Repeat Business?)

Have You Ever Calculated, Based On Average Value Of A Sale, And Lifetime Value Of A Customer, What Is A Reasonable Customer Acquisition Cost?

Materials / Files You Can Provide

Please Indicate What You Can Provide For Us To Work From By Circling Them And Making Notes Below And Then Send Digital Copies If Possible Or Assemble Hard Copy For Us To Review.

Logos, Branding Images, Photography, Literature, Handouts, Presentations, Advertising Materials, Copy, Messaging Discussion Points.

SEO / PPC Keyword Worksheet

Please Make A List Of As Many Internet Keywords That You Think Prospects Might Use If Searching Google For Products And Services Such As Yours. For, Example “Toledo Chiropractor” Or “Toledo Auto Mechanic”, Or “Management Consulting In Northwest Ohio”. List One Keyword Or Multiple Keyword Search Phrase Per Line.

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Domains, Urls, Social Media Accounts Owned and/or In Use

Current Marketing Website(S) Url, Username, Password

Domain Registrar, Username, Password

Any Other Hosting Usernames, Passwords

Other Useful Usernames, Passwords
