419-764-9649

Client Discovery Questionnaire

Note: Some Questions May Not Be Relevant. You May Skip Them, But The More
Information You Provide, The More Likely We Can Produce The Results You Desire.
Be Sure To Print Then Send To Email@BigMarketingSolutions.com When Finished.

Date Completed

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

Tag Line Or Slogan?

Physical Address:

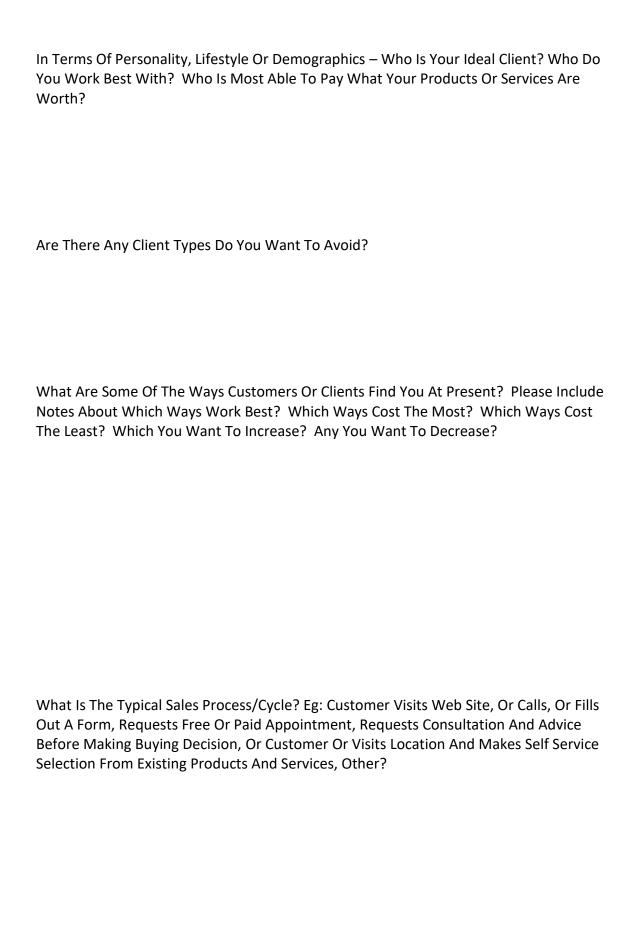
Best Phone # And Email Address:

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 You 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
Percent of Sales / Priority For Future Growth
List Most Important Geographic Area Served, Cities You Would Like To Target, Counties, States, Countries



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?

Method Tried	Worked	Failed	Current	Desired	Notes
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.

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		