

Survey Intake:

You can also use this as a guide or your own self-discovery per your business. This is the snapshot I need to begin to get your marketing going..so the questions I ask.

If you are working with me I need this filled out with detail, and yes, confidentiality is key.

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Do you need a new business start up, an existing business that is new to be revamped or an existing business (over five years, profitable) overhaul.

- or are you changing direction totally?

Name 1-3 competitors in your growth range (not people on TV, etc)

Where have you gleaned your current clients?

If from a third party, where have you specifically gleaned clients on your own and how?

Are you currently working with charities OR events of any type? Do you want to. Have you in the past. Tell me about them.

What are your sales goals. (realistic, not vague but measurable) based upon what you are doing NOW.

What are your sales goals (same as above) with changes?

What problem do you solve for your clients

What are the benefits of that solution

What is your target market

What is unique about your company compared to competition

What methods do you use to educate new people to your service (name three)

How in control are you of your marketing efforts if you are on a budget (do you build your site, do you make your own flyers, etc) and do you want to be more in control or shall we factor that cost (even if you barter we have to factor a

realistic cost if the barter falls through– you are still depending if you barter)

What are your sales cycles – when are you busy

Based upon your marketing efforts how do you measure success or ROI?

Do you have a business plan in place.

Are you insured

Are you incorporated

Do you have a business account

Why do you have the items you do (a website, pages, social networking, etc) in terms of your business – what are the purposes. *hint, each one should be a different purpose.

What goals do you have for your business in next four weeks

...next three months

...next six months

Since you have these goals, what do you have in place to get there.

Add anything else you need.