

Client Needs Assessment

Sales Rep Info

Name: _____

Date: _____

Tell Us About Yourself/Your Business

Account Name: _____

Social Media: _____

Contact Name: _____

Business Category: _____

Email: _____

Key Product/Services: _____

Web Address: _____

What are your top business priorities... where are you doing well, where do you need to grow?

What's your company's edge over competitors (niche)?

What is the value/worth of a customer for you?

What geographical area do you wish to target?

What time of day – or day of the week – do you feel it is best to reach your customer?

What are your marketing objectives?

- Drive website traffic
- Drive ecommerce sales
- Drive price & product
- Build brand awareness
- Build email database
- Generate sales leads
- Drive foot traffic
- Grow local market share
- Grow regional market share
- Build reputation
- Other: _____

Who is your ideal customer?

- | | | | |
|--|-----------------------------|--------------------------------------|-----------------------------|
| <input type="radio"/> Male | Age: | Income: | Geographic Area: |
| <input type="radio"/> Female | <input type="radio"/> 18-24 | <input type="radio"/> <\$25,000 | _____ |
| <input type="radio"/> Children at home | <input type="radio"/> 25-34 | <input type="radio"/> \$25K-\$34,999 | Occupation: |
| <input type="radio"/> Home owners | <input type="radio"/> 35-44 | <input type="radio"/> \$35K-\$49,999 | _____ |
| <input type="radio"/> Renters | <input type="radio"/> 45-54 | <input type="radio"/> \$50K-\$74,999 | Lifestyle/Interests: |
| | <input type="radio"/> 55-64 | <input type="radio"/> \$75K-\$99,999 | _____ |
| | <input type="radio"/> 65+ | <input type="radio"/> \$100K+ | |

During the past year, have you advertised in any of the following media? Was it effective?

- | | |
|---|--|
| <input type="radio"/> Newspapers _____ | <input type="radio"/> Magazines _____ |
| <input type="radio"/> TV/Cable _____ | <input type="radio"/> Billboards _____ |
| <input type="radio"/> Radio/Broadcast _____ | <input type="radio"/> Direct Mail _____ |
| <input type="radio"/> Yellow Pages _____ | <input type="radio"/> Internet/Interactive _____ |

During the past year, what interactive products have you used to reach your marketing objectives?

What vendors/websites did you utilize? Were they effective?

- | | |
|--|---|
| <input type="radio"/> Banner Ads _____ | <input type="radio"/> Email Marketing _____ |
| <input type="radio"/> Video _____ | <input type="radio"/> Mobile Marketing _____ |
| <input type="radio"/> Contests (online) _____ | <input type="radio"/> Ecommerce _____ |
| <input type="radio"/> Directories (online) _____ | <input type="radio"/> Social Media _____ |
| <input type="radio"/> Coupons _____ | <input type="radio"/> Daily Deals/Groupon _____ |
| <input type="radio"/> SEO _____ | <input type="radio"/> Reputation Services _____ |
| <input type="radio"/> SEM _____ | |

What was the goal of the campaigns, and what action did you want them to take when they saw, clicked or read your ad? Were you provided analytics? Would you be willing to share?

How do you plan to gauge/track the effectiveness of an advertising campaign?

What other information about your business, your goals or your objectives can you share to help me create an effective marketing strategy?

Would you be willing to share:

Annual sales: _____ Current advertising spending: _____
Annual advertising budget: _____ % of advertising of total sales: _____
% of market share: _____

How a business should calculate their marketing budget

Recommendation: Spend between 2-5% of sales. Some companies spend upwards of 9-15% when warranted – especially young companies that need to invest to build their brand.

- For example: Target spends 2% of its sales on advertising, while Best Buy spends upwards of 3%. Finally, more upscale stores like Macy's typically spend on the order of 5%
- Automakers generally spend between 2.5%-3.5% of revenue on marketing, liquor spends 5.5%-7.5% and packaged goods spends 4%-10%.

Businesses should allocate a minimum of 3-5% of total sales to advertising and marketing. However, allocation will depend on several factors: the industry you're in, the size of your business, and its growth stage. For example, during the early brand building years retail businesses spend much more than other businesses on marketing – up to 20% of sales.

As a general rule, small businesses with revenues less than \$5 million should allocate 7-8% of their revenues to marketing.

Source: U.S. Small Business Administration, SBA.gov, January 2013

What prompted you to reach out to us?

If you talked to 5 clients/customers how many would normally convert?

On average, how long do you retain a customer/client?

What are the factors in determining if your campaign is successful?

Who else, besides you, is involved in planning/decision making?

If proposed campaign makes sense, what's your vetting/approval process and timeline for a decision?
