

Business Discovery Questionnaire

About Client

What you do? These are their product and/or service offerings - let's call them verticals.

What percentage of your business do you want each of these verticals to be?

Can we do a quick org chart of the employees and their basic role within the company?

Contacts

Who are the primary contacts within each service?

Who are the typical buyers for each service?

How do you capture all your existing customers' contact information?

What type of system is it stored in?

Do you have an email platform, such as Constant Contact or MailChimp or can you communicate with customers through your POS system?

Are your customers in one database? Is this list segmented? What should the segments be? Example - Customers by service? Customers by industry? Referral Sources?

How often and how are you currently communicating with existing and past clients? Email, social media, events, meetings, etc.?

Business Development & Branding

Do you have a CRM? Who uses it? How effectively is it being used?

Where are you getting your work from?

How or do you currently ask customers to spread the word about your business?

What advertising (print, broadcast, online, etc.) do you have planned? If appropriate, please provide your media buy schedule.

Print

Radio "2014 - 2015 Portland Radio Group 1/2."

Television

Online

Pay Per Click

Other

Does your company currently have memberships or affiliations with organizations of importance to business development or company awareness and brand? E.g., Chamber of Commerce

Do you participate in charitable or community organizations/events?

What are you most proud of that you do? What do you excel at over the competition?

Events

Do you host any events for your company?

How often do you or other staff attend events on behalf of the company?

Which events do you attend regularly?

Do you or anyone with the company contribute to any organizations or publications like writing, speaking, being on panels, sitting on boards, etc.?

What's not currently on the calendar that you plan to or want to add to the year?

Content

Tell us about the content you use - written, photography, podcast, video, blogs, ebooks, FAQ's, sales collateral, powerpoint etc. Who is responsible for creating? Who is using it?

How do you catalog images, video etc. that you use to communicate about your company?

Where do you want us to source content from? Sales reps? Case Studies?

Who are your competitors? OR Aspirational companies that you don't compete with.

What is the best way for us to review customer testimonials? How are they being managed and used today?

Where do you want your company to be positioned in the marketplace? What do you want it to look like?

Social Media

Who manages your Facebook and Twitter accounts? What is their process?

What other social media networks are you on?

Locations

What role do you want the store to play in your brand, marketing and sales process?

Website

What platform are you on, and who maintains it?

Can you talk to us about your vision for the website? What's its purpose? Who will be using it?

Can you name some websites you love in terms of design, functionality, content, etc?

Graphics/Style Guide

Can you provide us with high-res versions of your logo and other key graphics? If not, who can?

Do you have a style guide we can reference (font's, colors, etc.)