

## Marketing Plan Questionnaire Outline

The questionnaire for the setup of your Marketing Plan is available online. To assist you with advanced preparation we have provided this outline of the questions.

When you're ready, navigate to the website below and begin the questionnaire by uploading your worksheets at: <http://www.joomconnect.com/mpstep1>.

### Step 1:

#### Worksheets

Please complete the following worksheets (#3 is optional). These should be submitted prior to moving on to the next step.

1. SWOT Analysis
2. Direct Competition
3. Personal Celebration

### Step 2:

#### Project Contacts

1. Who will be our primary contact for your team?
2. An optional (but recommended) secondary contact.

#### About Your Company

1. How would you describe your company to someone who knows nothing about you in 30 seconds or less.
2. Can you describe your business in eight (8) words or less?
3. When was your company founded?
4. Detail a brief company history:
5. What is your mission statement?
6. What is your company slogan?
7. Do you have a business plan? When was it last updated?
8. What goals, if any, do you have for your business outside of your marketing?
9. What makes your business unique in the market? Does your business offer any specialty services or a particular expertise?
10. Have you received any awards?
11. Using distance or time, what is your service area?
12. Are you prepared to grow? How would you measure this growth—are you looking to expand your physical service area, or add new verticals, or new services?

#### About Your Sales Process

1. Do you currently have an organized process for lead generation? (If yes, please describe.)
2. Do you currently have an organized process for converting a lead/prospect to a customer? (If yes, please describe.)
3. Do you currently have an organized sales process to encourage current customers to purchase more of your services and/or products? (If yes, please describe.)
4. On average, how long is your sales cycle?
5. Do you have prospects lists?
6. Are your prospects lists maintained?
7. Are relationships with your prospective clients reflected accurately in your CRM?
8. Where is your business currently finding its customers?
9. What are the top reasons a lead doesn't close?
10. What initiatives are in place to help retain your customers?

### Step 3:

#### Your Indirect Competition

1. List at least 3 companies you consider your Indirect Competition.

## Marketing Plan Questionnaire Outline (Continued)

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### Difference

1. Why, specifically, should your customers do business with you instead of anybody else? What keeps them coming back?
2. What can your services/products do for them, unlike any others?
3. Select and describe specific offerings that make you different. (ex. specific problem solutions, unique products, services, market niche, special offers, message of values, unique packaging, customer service, business practices)

### Promises

1. What can you guarantee your customers that no one else can?
2. What features and benefits do your customers care about?
3. What areas do you feel your company could improve on? Are there any plans in place to do so?
4. Which areas do you think fall short of your clients' expectations? How do you plan to resolve this?
5. What internal procedures that you'd like to improve?

### Step 4

#### Your Products and Services

1. List your top 10 services, in order of popularity.
2. How are services offered, as part of an all-inclusive package or as one-off agreements?
3. If one-off, which services would you most like to see an increase in sales?
4. Are you considering adding any new services? If so, please explain.
5. What is your time frame to add these new services?
6. What misperceptions do prospects have about your brand/services?

#### Your Pricing

1. Are your prices easily understood?
2. How is your pricing set? (per seat, per site)
3. How do your prices relate to your competition?
4. How do you think prices relate to your industry standard?
5. Are your customers generally satisfied or unsatisfied with your pricing?
6. Any additional information you would like to provide, regarding your pricing?

### Step 5

#### Your Customers

1. How would you describe your ideal client?
2. Are there any groups or networks that your target audience may belong to? (ex. professional, social, etc.)
3. What were some of the common needs/pain points that your current customers were faced with when they came to you for a solution?
4. Please define a small, medium and large business: (ex. number or workstations, servers, or users)
5. Is there a particular business size you prefer to target?
6. Is there a vertical/industry you prefer not to target?
7. Do you have any additional requirements for a customer?
8. Do you perform exit interviews in the event of a lost customer?
9. Are you open to targeting former/lost clients?

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## Marketing Plan Questionnaire Outline (Continued)

### Step 6

#### Customer Service

1. Describe a picture of your ideal customer experience.
2. What does your company do to ensure customer satisfaction?
3. How does your company measure customer satisfaction?
4. Do you do anything to encourage your clients to speak to your prospects? If so, what?
5. What do you do to encourage customer retention and loyalty, both long term and on a day-to-day basis?
6. Do you have an established process for documenting and addressing customer feedback?
7. Do you do business reviews at regular intervals (quarterly, annually, etc.)?
8. If you have lost customers in the past, what was the reason?

### Step 7

#### Your Current Marketing

1. What would you consider to be your ultimate marketing goal?
2. How much do you currently spend on marketing annually? What is your projected marketing budget?
3. How many of your employees have some part in your marketing efforts?
4. Is this their only responsibility? If not, how much time is available for them to work on your marketing?
5. Is there clear communications and goals established between your marketing and sales teams?
6. Have you engaged in any marketing efforts in the past year? If so, what were the results?
7. Have you ever purchased third-party campaigns? How do you think they performed?
8. List any current/ongoing marketing initiatives/strategies.
9. What marketing metrics do you currently track?
10. What are your marketing strengths (in terms of consistency, messaging, responsiveness, etc)?
11. What are your marketing weaknesses (in terms of consistency, clarity, responsiveness, etc)?
12. What does a successful marketing campaign look like?
13. What tools do you use to manage your marketing?
14. What role does your website currently play in your marketing strategy? In what ways do you try to drive traffic to your website?
15. Are you actively updating your website, in terms of its content and messaging?
16. What multi-media marketing materials do you have, in terms of videos, podcasts, etc?
17. What other advertising methods do you use, such as print, television, radio, etc?
18. In what ways do you try to drive traffic from social media to your website?
19. What processes do you have in place to track and measure your marketing efforts?
20. Do you have an established referral program? If yes, please describe. How do you reward clients who deliver successful referrals?
21. Are you a Chamber of Commerce member? If so, what is your chapter's name?
22. What marketing done by a competitor did you admire/made you jealous?
23. Do you have any other affiliations or memberships?