

Business Name Industry

Brand Positioning Statement

Store locations

Website

Primary decision maker/s

Name of others involved in marketing decisions. (At business or agency)

Name Title

Name Title

To better understand your business and to help recommend an effective marketing strategy that sets you apart from your competitors it's necessary for us to learn about your business and your industry.

Firstly, how long have you been in business? Date opened?

If you don't mind me asking, why did you decide to work in this industry?

Do you have separate Marketing Strategies for each store, if so what drives that and what are they?

What do you consider your biggest advantages? (tick)

☐ Product Range ☐ Customer ☐ Experience ☐ Location ☐ Expertise ☐ Reputation ☐ Brand Penetration

☐ Market-share ☐ Repeat Business ☐ Customer Acquisition ☐ Referrals ☐ Other

How developed is your Sales Funnel Effectiveness?

Converting Strangers to Visitors **Visitors to Leads**

Leads to Customers **Customers to Promoters**

What % of this is done via digital marketing? %

Why do people come to you rather than a competitor?

What exclusive customer advantages do you have?

What percentage of market share do you think you have? %

What is your desired % of market share? %

What would it mean to you to achieve this?

What are your current plans to achieve this?

Who are your major competitors & What % market share do they have? (Within your immediate core prospect footprint)

Why do you think people go to your competitors?

Do you lose local Prospects to Amazon or overseas businesses?

What is it's the primary function of your website?

Outside of your own website, how do you interact with your prospect/customers online?

It's important for our planning to learn about your customers.

What Customer type is your Primary (ideal) Target Market?

(Age, Gender, Income, Location, Buying Patterns etc)

What Customer type is your Secondary Target Market?

(Age, Gender, Income, Location, Buying Patterns etc)

What Customer type are your Desired (want more of) Target Market?

(Age, Gender, Income, Location, Buying Patterns etc)

How many staff have you got? Are they good at converting prospects (and then upselling)?

In terms of trading what are your best months?

Your best days?

Can you list your major promotions planned for the next year and what marketing channels you think will work to ensure their success

JAN	
FEB	
MAR	
APR	
MAY	
JUN	
JUL	
AUG	
SEP	
OCT	
NOV	
DEC	

What % of your budget is apportioned to:

Events % Print % Digital % Broadcast %

Website % Inbound marketing % Other (please specify)