

# Company Profile Questionnaire Abraham Consultation

## ABOUT YOU

Describe your position:

How long have you owned or been at the company?

Describe your background -- what did you do before you started, bought or came into this business?

Describe exactly who the owner or owners are.

Tell me all about the goals of the owner:

What is the operating philosophy that the business has been built on?

What people, what books, what life factors have influenced and impacted the person who is answering this questionnaire?

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What do you really want from your business? Do you want to become filthy rich? Do you want it to become a turnkey money machine? Do you want to position and maneuver it for ultimate sales? What are your goals?

Explain where all your time is being spent versus where it should be spent.

What initially got you started in your business? (What motivation, occurrence, etc.)

How have your methods for doing business, or the product(s) or service line(s) you market, changed since the inception of your business?

Describe your training, your interests, your hobbies. What do you do when you're not at the office, and why?

Describe your family. Are you married? Are you divorced? How many children? How is your health?

What is your greatest life achievement?

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What one thing, more than anything else, do you want to accomplish in your business before you get out?

If you had a magic wand, would you rather attract more new customers or garner more money from your existing customers, and why?

What is your long-term strategy? Do you want to own the business forever? Do you want to set it up for someone else to run it for you? Do you want to sell it? Or do you just want to make a wad of money and then stop?

If you had as much money as you wanted, what would you do to improve your product or service and what impact would that have on your customers?

Where do you see your industry in five years?

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What is your vision for your business for the next:

6 months?

1 year?

3-5 years?

10 years?

What is your biggest opportunity to achieve this vision?

What is your greatest strength, and is it consistent with this opportunity?

What is your greatest problem or weakness in achieving this vision and what's the solution?

## **CORPORATE PROFILE**

List your last five year's sales - gross sales and approximate profits (pre-tax).

Indicate all costs of sales.

List all overhead factors, showing breakdowns of what the overhead includes.

Describe what your business does completely (all the products and services you sell, how you sell them, and who you sell to by industry, commercial category or specific niche).

What are your year-to-date sales levels?

Where does most of your business come from?

- a. Product or service
- b. Category of customer
- c. Geography
- d. Who has the highest propensity of buying from you?

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What is your business philosophy as it relates to your customers?

When was the last time you introduced a new product or service to your market (both existing customers and prospects), how well did it work, and what was the reason?

Describe your company's general infrastructure, including:

Sales Management.  
Are you a manufacturer? Describe.  
Number of people employed.  
Job descriptions and responsibilities.

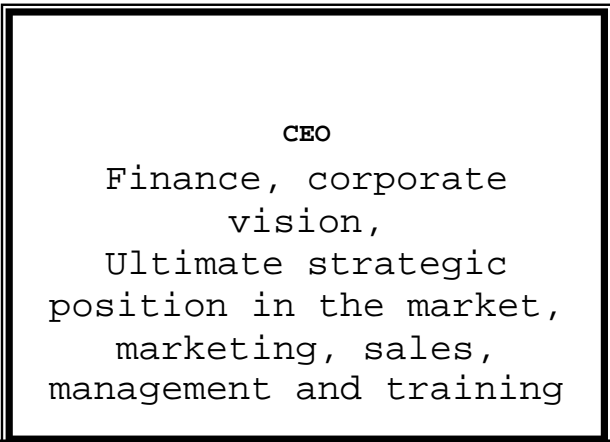
What is the power structure? (For example, "I own the business but I'm never there, and I defer to my manager.") I want to know whether it's hands on, hands off, who runs things, what kind of turf or political environment we're dealing with, who the decision makers are.

Who does your bookkeeping and who is going to be our operative? I want that operative to be enrolled in this process.

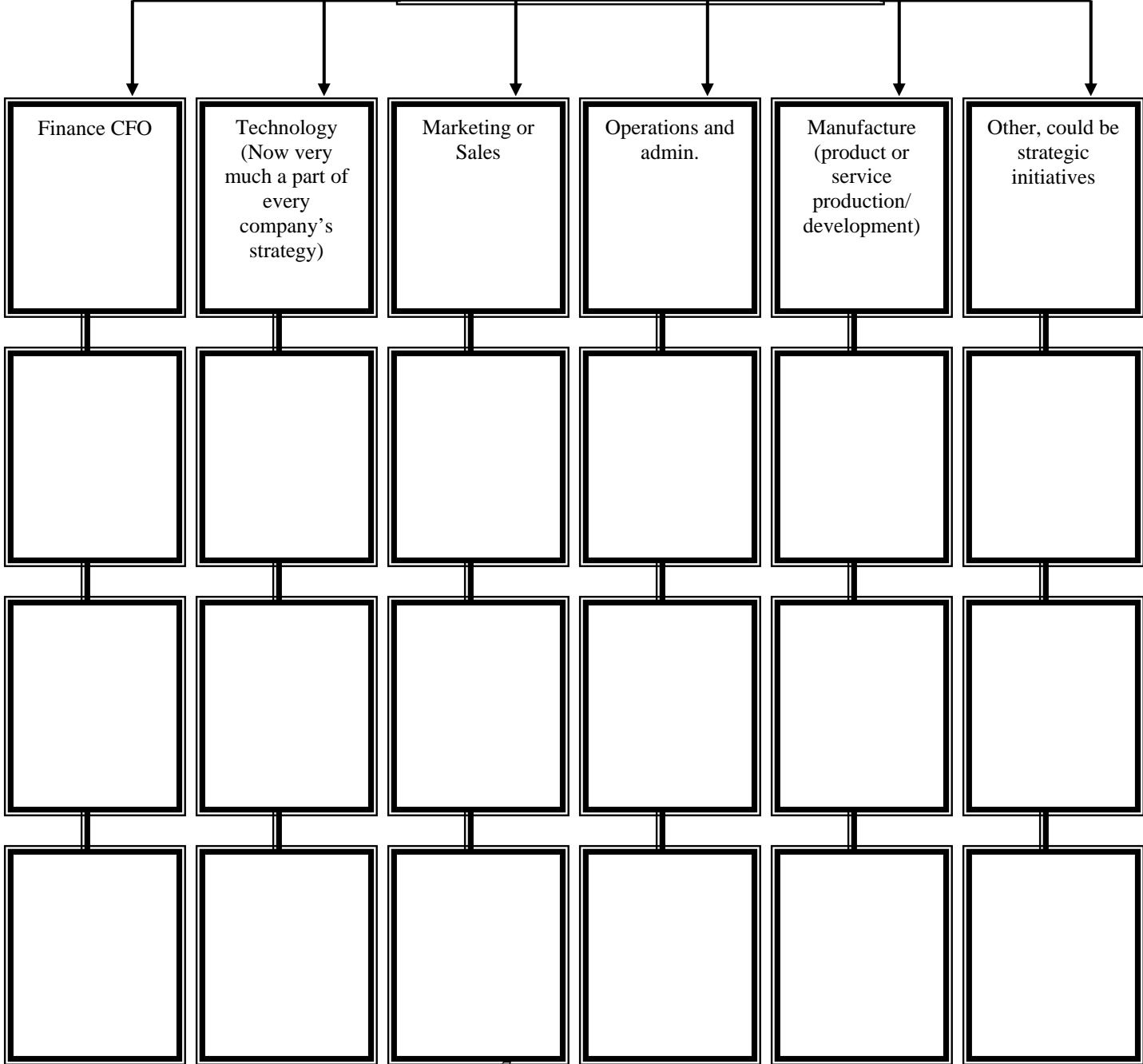
Explain, realistically, how much more business you can add without having to add any more people, equipment, service or space.

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Please fill in appropriate name, even if one person is responsible for several areas, write their name in each of the areas. If you cannot fill in all the boxes, take this time to fill in Initiatives you are, or should be pursuing to improve your organization



Your company may not have four layers of management to fill up the boxes, but you should continue down the org chart to show what your organization would look like if it did have these layers.



How do you explain your company to someone outside your industry (i.e., at a party), keeping it as simple as possible.

Now describe your company in one sentence.

How do you explain your company to someone in the industry (i.e. to a potential buyer or client)? This is the “company pitch,” NOT the product pitch.

## **CLIENT BASE**

How many active customers do you have?

Exactly what kind of data do you have on them? Include everything you know about your customers including: names, addresses, telephone numbers, fax numbers, e-mail addresses, type of businesses, location, what and when they have bought, how you attracted them, the last date of contact with them, etc.

How many “dream” clients are there (the absolute most perfect clients, that 20% that would drive 80% of your sales?)

What does it cost you to get a new customer? (e.g. if you ran an advertisement that costs \$1,000 and you attained two new customers it would be \$500.)



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What is the average sales and profits generated from a new customer in the first year and how is that information useful in your overall marketing strategy?

What's the "lifetime value" of your typical customer? (i.e. how much revenue will he/she generate for you over the entire period he/she does business with your company?)

Explain where all your business is coming from (demographics), versus where all your time is being spent.

What is your biggest and best source of new business, and are you doing everything possible to secure this business? If not, why not?

As a percentage, how much of your business comes from referrals?

Go through all 30 of the standard options in the "Three Ways to Grow a Business Model" (See Attachment 1 - "30 Standard Options.") and tell us what you do. In other words, do you have a referral program? If the answer is no, explain why. If the answer is yes, describe how it works, what you do. Include all the details.

## **SALES FORCE**

Selling infrastructure:

Describe your sales force.

Do you have inside sales people?

Who does what?

How they are paid?

What are their average income levels?

Have you tried different types of compensation programs? Was there an effect on sales?

If you have a lot of different sales people, indicate the variance of performance, from the best to the worst, what the best excels at and what the worst excels at, and where their strengths and weaknesses are.

What is your average order amount, and what are the steps you can take to increase it?

What are your sales (gross and net income) per salesperson? Is that above, below, or equal to your industry average and what are the steps you are taking (or going to take) to improve it?

What are the standards for hiring salespeople?

How much professional sales training have you personally had?

What type of training do you offer your salespeople (both junior and senior)?

What other training do you offer, such as product training, account management training, or time management training, and how? (internally, externally, etc.)

How often is training provided?

What is the turnover rate for salespeople?

Describe the typical sales cycle to close a sale, from generating the lead through to a close:

A) How many contacts does it take to close a sale? How many different people do you usually meet with to close a sale?

B) Length of cycle from initial contact to close?

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What are the most frequent objections you hear?

If you target 10 prospects, how many will you close? (Closing ratio)

As a percentage, with how many clients are you dealing directly with the top decision maker?

List three things you could do to strengthen your relationship to the top decision maker:

- 1.
- 2.
- 3.

What are the top three reasons that a prospect would do nothing at the end of the sales cycle?

- 1.
- 2.
- 3.

What do you do with the prospects you don't close?

How do your closing ratios fare against competitors?

Do you utilize another form of direct sales (independent sales reps, dealers, manufacturer's reps)? If you do, have you ever compared the results to an inside or outside sales force?

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What has your prospecting approach been?

What prospect data do you have, i.e., lists, etc.?

Do you go to trade shows? What do you do, and how do you show? What is your preparatory approach? What promotions do you do in conjunction with trade shows?

What is your selling presentation?

What is your sales proposition (“pitch”)? Literally write it out. In other words, if there’s a basic premise that you use, describe exactly what it is.

What kind of ongoing sales management do you have? Do you have a defined, designated person as a sales manager? Describe his/her duties and objectives and how do they coincide and fit with the overall marketing strategy? Do your sales people manage themselves?

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After the initial sale, are there systematic, formal methods you use to communicate and resell your customer? If so, what are they? If not, should there be?

How much time per week do you personally devote to sales or salespeople?

What sales functions did you perform when you started your business?

Do you do anything at the point of sale to increase the order or add on other products or future products or services, (upsell) and if so, what?

How long does it take you to fill an order after you receive it, and if you improved would it have a dramatic effect on your sales?

Is “buyer’s remorse” a problem for you, and if so how do you overcome it?

Do your customers feel your customer service department is prompt and courteous?  
Explain.

What type of training do you offer your service personnel?

## **MARKETING**

What is your target market and how did you arrive at it?

What's your market potential (universe) and your current share of that market?

Does your business market locally, regionally, nationally, or internationally now, and what change is required to satisfy your projected vision of your business?

Describe the company's marketing philosophy:

Do you have a written marketing plan that you adhere to? If so, explain it.

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Is the plan based on a fixed budget number (eg. \$1,000 per month in the Yellow Pages), or is it a variable percentage of sales?

What is your current, primary-mode of marketing? What percentage of your business comes from this?

Do you have a systematic back-end (selling your own or others' products to existing customers)? Describe how it works.

Do you use direct response marketing concepts (those designed to induce an immediate and measurable response)? If no, why not?

How much of your time each month do you devote to marketing, and how much will you devote in the future?

Do you have a marketing director? If so, describe his/her primary responsibilities and duties?

Do you use creative advertising, marketing, or advisory services? If so, who do you use? Describe what they do. What do you pay them? What have their contributions been and how have you used them?



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Do you have an adequate supply of customer testimonials, and is there a system in place for their capture? Are they written or taped, and how are they (or will they be) used in your marketing?

Do you actively solicit referral business? If so, how does it work and if not, why not?

Have you ever tried to reactivate your former customers and non-converted prospects? Explain.

Have you ever tried selling your non-converted prospects to your competitors? Explain.

Do you make consistent efforts to communicate with and educate your customers about what your company is doing to help them? How formal, informal, or systematic is the process?

Do you ever barter your products, services, or assets with other companies in exchange for their products, services or assets? If not, do you see barter possibilities in the future? Explain.

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Do you use bonuses in all your sales/marketing propositions, and how did it affect the response?

Do you use risk-reversal in your marketing propositions? Explain its effectiveness:

What kind of guarantee or warranty do you give your customers and how does it compare with your competitors or with the industry at large?

How do you capture the names, addresses, and phone numbers of all your customers and prospects? Do you then use them in your marketing programs?

In what other ways have you attained your existing customers (ranked from best to worst)? (i.e. yellow pages, spot advertisements, direct mail, direct sales, telemarketing etc.).

What is your selling season, if any, and are you actively looking to sell other complimentary products or services during the slower periods? If so, how do they interrelate?

How loyal are your customers? Is that normal, high, or low relative to your industry and what is the reason? How can it be improved?

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Briefly describe the niche you fill in the marketplace and in the customer's mind. Are they the same?

Do you provide incentive bonuses to your employees for creating new and better marketing methods for your company? Explain:

When you first started, how did you attract your first customers (what process, method or action did you use)?

Why did customers originally buy from you?

Why do customers buy from you now?

What has been your biggest marketing success to date (defined as a specific promotion, advertising campaign, telemarketing script etc.) and are you still using it or a version of it?

Describe every successful advertising, selling or marketing program you have engaged in for the last three years. Of these, how many have you continued, and how many were more of a "one shot" promotion?

If you had as much money as you wanted, what would you do to improve your marketing (i.e. what is your biggest marketing problem or challenge today)?

Do you have a PR effort? If so, what does it consist of?

Who is responsible for PR?

How does the press view your company?

Do you have a brochure/media kit? If so, how is it used?

### **SPACE ADVERTISING**

What is your advertising philosophy? What influenced or forged your thoughts on this and describe how you embody it into your ads, or do you?

Do you use direct response advertising (ads that cause a customer to take action, as opposed to “image” advertising)? If yes, please describe the essence of the offer or proposition you typically make. If no, why not?

Are your ads working? How do you know?

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Do you use two-step advertising (i.e. step one generates qualified leads, step two converts those leads to customers)? If so, describe it:

What is your conversion ratio (in other words, out of every “x” leads you get “y” customers or sales) and what are the different techniques you have used to improve it?

What is your advertising cost per sale (i.e. when you run an ad that costs \$1,000, you generate \$X of sales)? Have you tested different approaches to increase this number?

Do you use a conversion kit (a package of follow-up materials) to convert prospects to sales? If so, describe it. If not, describe the steps you take to convert a prospect.

Does your conversion kit contain a sales letter which not only educates the reader about the rest of the material but also about your company and what problems it can solve for them?

Do you test the different aspects of your advertising? If so, what do you test?

- |  |   |
|--|---|
| <input type="checkbox"/> Copy          | <input type="checkbox"/> Media                |
| <input type="checkbox"/> Offer         | <input type="checkbox"/> Headline             |
| <input type="checkbox"/> Price         | <input type="checkbox"/> Size                 |
| <input type="checkbox"/> Illustrations | <input type="checkbox"/> Publication position |

**DIRECT MAIL**

How much prospecting mail do you drop each month? To whom and why?

Do you use a list broker? If not, where do you get your names from? Are there non-competing companies who sell complimentary products/services that you could approach? (ie; a carpet cleaner approaching a carpeting company)

Do you test the different aspects of your mailings? What do you test?

- |                                |                                   |
|--------------------------------|-----------------------------------|
| <input type="checkbox"/> Copy  | <input type="checkbox"/> Media    |
| <input type="checkbox"/> Offer | <input type="checkbox"/> List     |
| <input type="checkbox"/> Price | <input type="checkbox"/> Headline |

What is the return on investment for your mailings, and how do you think it could be improved?

How often do you mail to your own list of customers? Is your mail informational or do you solicit additional sales from them?

Do you rent out your customer and/or prospect lists? Explain:

Have you ever used telemarketing as a follow-up to a direct mailing? If yes, what is its effectiveness and if no, why haven't you?

## **STRATEGIC PARTNERS**

What strategic alliances, if any, do you have or have you ever had? How did they fare and how did they affect your business?

Who stands to gain more than you if you grow, i.e., people who have products or services that are purchased after your products or services are purchased, or concurrent to the purchase?

Who are your suppliers or other providers of products or services that benefit massively when you are successful?

What products or services do people normally buy prior to, in conjunction with and right after your product is purchased?

## **USP**

Indicate every unique aspect of either the performance, the construction of, the buying of, or the rendering of your product. I'm looking for unique selling proposition points. List the results, the advantages, the benefits, the protections, the enhancements, the prestige factors, that your product or service brings to a customer or client. Be very specific, very measurable, very detailed.

What do you believe your single most competitive advantage is?

What are you most proud of about your business, product or service?

What problem does your product or service solve for the customer? Describe your customer's needs and the positive results your product/service provides?

Give a specific assessment of the transactional implication your product or service has in the end-user's life. In other words, if, because someone has your product or service, they save \$400 a month forever on electricity... I want to know what that is. If you're a real estate person and you put someone in a greater lifestyle and get them a house that can appreciate, I want to know all about that. List all the factors.



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What is your Unique Selling Proposition, or USP? Why do your customers buy from you? What is it about your product and/or service that distinguishes you from your competition? (You may have more than one for different product/service lines or segments of your business.)

Why must a prospect buy your product or service? What would make it irresistible?

What do your customers really want? (Be specific, don't just answer a quality product or service.) How do you know?

What products/services do clients want that you do not offer?

Is your USP a consistent theme in all of your marketing and sales efforts? If yes, how, and if no, why not?

## **COMPETITION**

Describe your competition. (Use above criteria; Rate each on a scale from 1-10) on:

<i>Competitor's Name</i>	<b>Product</b>	<b>Sales Ability</b>	<b>Marketing Ability</b>	<b>Customer Service</b>
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1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

5) \_\_\_\_\_

*Now rate your company:*

6) \_\_\_\_\_

Describe all you know about your competitors:

Where are the top three located?

What do they do best?

What do they do worst? How do you specifically fill that void?

Describe as much as possible about their selling approaches, their selling strategies, their infrastructures, etc.

What do they offer that you do not?

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What steps do you take to offset their advantage? Are they working? If not, what needs to be changed?

What are the top three reasons that you lose business to a competitor?

Do you buy from your competitors to keep track of what they're doing right and wrong? Explain how these insights have helped you refine and better focus your overall business strategy.

What is the biggest customer complaint about your industry, and how does your company address this problem?

Why do customers buy from you? Do they buy from you exclusively or do they also patronize your competitors? What steps can you take to get the main portion of their business?

Do you actively seek information from experts in your field and other fields related to yours? Explain:

## ATTACHMENT 1

### 30 STANDARD OPTIONS

#### **I. METHODS TO INCREASE THE NUMBER OF CLIENTS OR CUSTOMERS**

The number of clients can be increased by **increasing the lead or inquiry generation, increasing the client retention rate**, and by **increasing the conversion from inquiry to sale**.

##### **Increase your lead or inquiry generation through:**

1. Referral systems;
2. Acquiring customers at break-even up front and making a profit on the “back-end”;
3. Guaranteeing purchases through risk reversal;
4. Host-beneficiary relationships;
5. Advertising;
6. Using direct mail;
7. Using telemarketing;
8. Running special events or information nights;
9. Acquiring qualified lists that more effectively target your prospect;
10. Develop a Unique Selling Proposition (USP);
11. Increasing the perceived value of your product/service through better client education;
12. Using public relations.

##### **Increase your customer retention rate by:**

1. Delivering higher-than-expected levels of service;
2. Communicating frequently with your customers to nurture them.

##### **Increase your conversion from inquiry to sale by:**

1. Increasing sales skill levels of your staff;
2. Qualifying leads up front;
3. Making irresistible offers;
4. Educating your clients by giving them the “reasons why.”

## **II. METHODS TO INCREASE THE AVERAGE TRANSACTION AMOUNT**

### **Increase the average transaction value by focusing on:**

1. Improving your team's selling techniques to effectively up-sell and cross-sell;
2. Using point-of-sale promotions;
3. Packaging complementary products and services together;
4. Increasing your pricing, and hence your margins;
5. Changing the profile of your products or services to be more "up market";
6. Offering greater/larger units of purchase.

## **III. METHODS TO INCREASE YOUR TRANSACTION FREQUENCY:**

### **Increase transaction frequency by focusing on:**

1. Developing a back-end of products that you can go back to your customers with;
2. Communicating personally with your customers (by telephone, letter, etc.) to maintain a positive relationship;
3. Endorsing other people's products to your customer base;
4. Running special events such as "closed door sales", limited pre-releases, etc.;
5. Programming customers;
6. Price inducements for frequency.

## Is Your Business Strategically Stunted?

This is a proprietary and conformation 89 Question Diagnostic Assessment designed to help me determine the level of Tactical vs. Strategic thinking among marketing trained entrepreneurs on my e-mail list.

The following 89 question assessment form will help you and I, alike ascertain JUST how strategic or tactical your marketing really is. It will help me see who really gets the power of strategy driving marketing tactics and who doesn't. It will reveal ideas, insights and opportunities I can use to help everyone in the future improve their ability to strategically market. It will plug me into the mindsets and activities that the most strategic thinkers among you are currently doing. It will identify major gaps in thinking and actions I need to alert you on.

By you participating in this diagnostic assessment process and completing all 89 questions on the form below. I'll be able to thoroughly analyze, interpret and assess the general state of marketing sophistication and progress, among my e-mail list. I'll be able to formulate powerful hybrid strategic breakthroughs and amass priceless research data. I will openly share my findings back with all of you who participate in the process.

Please sit down---right now---and try to honestly answer all 89 questions that follow. Your candid and complete answers will contribute meaningfully to my work in preparation for my upcoming \$25,000 Marketing Strategy Setting Super Summit. In gracious appreciation---I will create a complete interpretive analysis report that presents and shares my findings, conclusions, recommendations and the best strategic and tactical thinking and ideas that result from all who participate.

Pre-Assessment pop quiz to get your mind in gear.

### TRUE OR FALSE

- 1. When studying my materials, you **constantly** look for new tactics, quick pay back ideas, techniques, methods, scripts and letters which will help you in your quest to grow your business. But **you never can seem to find enough new ideas** from me to keep your business growing at an acceptable rate.
- 2. You operate your marketing tactically, *jumping from one sporadic, erratic, and impetuous concept of mine to another*. Your marketing department tends to do things which are intermittent and inconsistent. Some weeks, you'll do an ad, some weeks you'll do a mailing and some weeks you'll do nothing. There's nothing that ties it all together.

- **3. Your business does NOT have predictable cash flow or profitability.** It's always feast or famine. Usually famine. You are constantly forced into short term cash "crisis management", or you are compelled to personally go out and "close some business".
- **4.** You know *you are massively under utilizing your resources* and waiting for external circumstances to change. (In other words, you are being totally **reactive** to the marketplace.)
- **5.** You don't know how to **integrate, let alone sustain** more than one or two of the 287 powerful marketing concepts I have developed over the years.
- **6.** You can recite almost every one of my methods and techniques from memory with theoretical brilliance. But you can't implement any of my methods, even if your life depended upon it.
- **7.** You tried some, perhaps many, of my concepts from my training programs and products, but the results were so meager, you lost your enthusiasm and drive to dominate your industry. However--- **You are absolutely committed to your success and hopeful that the reason lies somewhere in your execution.**

## Begin Here With The Real Assessment Question

- 1.) \_\_\_ Yes \_\_\_ No I know the difference between strategy and tactic. If "yes" define your understanding of the two below:

Strategy mean:

Tactics are:

- 2.) \_\_\_ Yes \_\_\_ No I have an overriding business strategy driving all my business activities---specifically all my marketing activities.

My business strategy is \_\_\_\_\_.

My master marketing strategy (which is different from my general business strategy) is \_\_\_\_\_.

My marketing strategy has \_\_\_\_\_ different elements pillars or foundational "pylons" supporting it.

They are (please list general categories):

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

(Use additional space if required.)

- 3.) My marketing strategy is based on the following key strategic/tactic objectives.
- 4.) My business vision for my company is \_\_\_\_\_.
- 5.) How many different applications do you have of every marketing tactic you use? I.e. 22 different referral generating approaches/methods. List below.

## Number of Different Applications Being Used

- 6.) \_\_\_\_ Yes \_\_\_\_ No Do you know the difference between an approach/method or system---**and a strategy**? If “yes,” please describe and define both in your own words.
- 7.) What books or people have influenced your strategic thinking?  

<u>Name</u>	<u>Author</u>	<u>Subject</u>
- 8.) What’s the biggest incite, realization, direction/concept you got from the above?
- 9.) If you have a marketing strategy plan in place explain how each/all of your marketing tactics integrate and combine to deploy or execute your main/big strategic objective.
- 10.) What’s your company’s competitive strategy in a nutshell?
- 11.) \_\_\_\_ Yes \_\_\_\_ No Do you think there’s any link between corporate strategy and success? If yes, what is it?



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- 12.) \_\_\_\_ Yes \_\_\_\_ No Do you have a strategy of pricing or is it just done arbitrarily and tactical?
- 13.) \_\_\_\_ Yes \_\_\_\_ No Do you link your people's performance and compensation should linked to your strategy.
- 14.) \_\_\_\_ Yes \_\_\_\_ No Do you analyze anyone else's marketing strategy? If yes, who, and what did you learn? How did you use it?
- 15.) What's the most revolutionary marketing strategy you've ever seen a company use?
- 16.) \_\_\_\_ Yes \_\_\_\_ No Do you regularly plan your marketing strategy and execution or is it just reactive on your part.
- 17.) What do you think marketing strategy REALLY is?
- 18.) What mindset defines how your business currently markets and competes?
- 19.) \_\_\_\_ Yes \_\_\_\_ No Do you think you're having trouble with your business or marketing strategy and if so where, how, and why?
- 20.) \_\_\_\_ Yes \_\_\_\_ No Does your business have a solid growth strategy in place? If yes, describe what it is.
- 21.) Describe what you think the world's #1 business strategy might be.
- 22.) \_\_\_\_ Yes \_\_\_\_ No Do you have a separate sales strategy that's distinguishable from how you market? If "yes" briefly describe below.
- 23.) \_\_\_\_ Yes \_\_\_\_ No Do you have a unified marketing strategy that controls and integrate all the tactics you deploy?
- 24.) \_\_\_\_ Yes \_\_\_\_ No Do you have a brand driven business?
- 25.) What's your e-mail marketing strategy in a nutshell?
- 26.) What competition forces do you think most shape YOUR marketing strategy?

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- 27.) \_\_\_ Yes \_\_\_ No Do you apply any military strategy to your business or marketing to achieve greater success? If so, what are they and how do you use them?
- 28.) \_\_\_ Yes \_\_\_ No Do you have a winning business strategy you follow? If yes, what is it briefly:
- 29.) How do you communicate your marketing strategy to the people who work for you?
- 30.) Whose business strategy do you most admire and why?
- 31.) \_\_\_ Yes \_\_\_ No Is customer lifetime value (marginal net worth) reshaping your marketing strategy? If so how?
- 32.) What's the most advanced marketing concepts or tools you use to sell more products to more people? Describe briefly below.
- 33.) Who is the most masterful business or marketing strategist you've ever known? How did he/she best apply their strategic genius? Describe their biggest strategic "coup."
- 34.) \_\_\_ Yes \_\_\_ No Do you have a profitable business/marketing strategy for the internet? If "yes" describe briefly below.
- 35.) How do you explain your marketing strategy to someone outside your industry (i.e., at a party), keeping it as simple as possible?
- 36.) Now describe your marketing game plan in one sentence.
- 37.) Describe the different marketing tactics you successfully use.
- 38.) What do you think are the Strategic benefits of each tactic?
- 39.) What are the Advantages people choose your company/product or service by (i.e. your USP)? Define briefly.

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- 40.)** What sequential marketing (if any) does a prospective client get when initial contact is made vs. when they buy your product/service?
- 41.)** What marketing efforts/activities do you want to be doing right now that you are not? Why?
- 42.)** Describe your competition and any effective marketing strategy or tactic they use that you don't.
- 43.)** \_\_\_\_ Yes \_\_\_\_ No Do you have a long-term written marketing game plan---- if so, include a written copy as an attachment with this questionnaire? How do you accomplish your marketing goals?
- 44.)** Briefly describe the complete strategic marketing cycle from generating the lead through to closing the sale on to requesting repurchase and all follow-up referral generating that you do.
- 45.)** How do you currently prospect and generate for new first time buyers?
- 46.)** What frequency of communication do you have with your prospects, active or inactive clients/buyers? What forms do they take (call, visit, letter, etc.)?
- 47.)** What tactics do you use to overcome frequently posed objections?
- 48.)** What is your strategy for reclaiming windfall profits from prospects you don't sell or close?
- 49.)** Describe five of your most formidable competitors and their marketing approaches.
- 50.)** What are the top two reasons that you lose business to the competition?
- 51.)** How much follow-up do you do with a client---AFTER they buy? With a prospect if they don't purchase? And with a client AFTER they buy.
- 52.)** \_\_\_\_ Yes \_\_\_\_ No Do you ask for referrals, how and how often?

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- 53.)** List three things you could do to strengthen your marketing effectiveness now.
- 54.)** List the materials, products, programs of mine you've been exposed to---plus how often, how well you've studied and honestly applied each one.
- 55.)** What's holding you back from doing more and better consistent marketing?
- 56.)** What would make your current marketing strategy more effective?
- 57.)** \_\_\_\_ Yes \_\_\_\_ No Do you know what the highest and best performing marketing approaches you have available are and how they are best used?
- 58.)** \_\_\_\_ Yes \_\_\_\_ No Do you continuously repeat successful market sales/lend generating activities on a systematic scheduled, bass.
- 59.)** How often do you send clients interesting information that is not about your product but could be relevant to them or their business? If often---example of what you include.
- 60.)** \_\_\_\_ Yes \_\_\_\_ No Do you or your people contact every active and inactive client at least once every 3-6 months?
- 61.)** \_\_\_\_ Yes \_\_\_\_ No Do you know what your attrition rate is? If so, do you have programming in plan to reduce or eliminate? List perspective.
- 62.)** \_\_\_\_ Yes \_\_\_\_ No Do you have your database segmented by category, products, geography, and etc?
- 63.)** How often do you follow-up with each category of buyer/prospect? Every day, week, month or year?
- 64.)** How often is your company in touch with clients as a corporate initiative, not something that depends on the mood or skills of an individual rep?
- 65.)** Describe the company's overcoming marketing philosophy.

- 66.) What is your own true attitude toward marketing?
- 67.) \_\_\_\_ Yes \_\_\_\_ No Do you use advertising tactically or strategically: give example?
- 68.) \_\_\_\_ Yes \_\_\_\_ No Do you have a PR effort? If so, what does it consist of? How often do you do it? How does it work? What benefit have you accepted?
- 69.) Describe your direct-mail efforts? Type, frequency, objective, and results.
- 70.) \_\_\_\_ Yes \_\_\_\_ No Do you use my three ways to grow a business model? If so, describe each category of what you do.
- 71.) \_\_\_\_ Yes \_\_\_\_ No Do you have a regular scheduled hours of communication, e-mail, newsletter, monthly update letter and etc.?
- 72.) How do clients perceive your company among everyone else in the industry?
- 73.) How do clients perceive your products/services/sales people and marketing?
- 74.) How do your competitors see your marketing? Describe their perspective.
- 75.) \_\_\_\_ Yes \_\_\_\_ No Do you have a database? If so, describe all the ways you use it for ongoing marketing purposes.
- 76.) Where does most of your business come from? (Products or services, types of customer and geography industry.)

- 77.)** Describe every successful advertising, selling or marketing program you have engaged in for the last three years that has worked. Indicate whether you've repeated it continuously.
- 78.)** \_\_\_ Yes \_\_\_ No Do you have a marketing budget? What is it? How is it allocated? How has it been used in the past?
- 79.)** \_\_\_ Yes \_\_\_ No Do you understand maximum allowable cost factor as it relates to lifetime value/marginal net worth of a client?
- 80.)** What-strategic alliances, if any, do you have or have you ever had in place? How did they fare and how did they affect your business?
- 81.)** Who stands to gain more than you if you grow, i.e., people who have products or services that are purchased after your products or services are purchased, or concurrent to the purchase service, etc.?
- 82.)** What are this years strategic goals?
- 83.)** What is the marketing philosophy that your business has been built on?
- 84.)** What people, what books, what other factors have influenced and impacted you the most about marketing?
- 85.)** Explain where all your marketing effort, time and money is being spent versus where it should be spent.
- 86.)** How much of your business comes from referrals? How much from advertising? How much from direct sales?
- 87.)** Go through all 30 of the standard options in the "Three Ways to Grow a Business Model" and tell me how many you do and each one has favor and how.
- 88.)** Describe your marketing positioning:

89.) What's your Marketing structure and \_\_\_\_\_:

**Congratulations!**

**Just by completing this questionnaire, you have placed yourself ahead of 95% of the business owners in America today, who never take the time to think deeply about their business. Those individuals (many of whom are your competitors) spend so much time working in their businesses that they never take the time to work on their businesses.**