



Silver Marketing Strategy

► Consultation Questionnaire

<i>Client:</i>		<i>Questionnaire Due:</i>	
<i>Marketing Coach:</i>		<i>Email to:</i>	scheduler@rosewood.us.com
<i>Marketing Guide:</i>		<i>Fax to:</i>	717-866-3500

Congratulations on your first step as a new client for Rosewood!

This Marketing Strategy Consultation (MSC) questionnaire allows our team to gain a contextual background of your company as they prepare for your personalized consultation.

Please answer the following questions as completely as possible. Feel free to complete this after you speak with your coach. Our scheduler will send you a PDF version if you prefer it online.

Some items may not apply to you or your company. You might discover it's helpful to review the entire questionnaire before entering your answers. Do not hesitate to add your own questions for discussion in your consultation.

COMPANY PROFILE (17 QUESTIONS)

1. What is the official address of your business? *(list addresses of multiple locations)*
2. Who are the owner(s) of the business? *(Name, phone, email)*
3. List all members on your management team. *(Name(s), title(s), phone, email for each)*
4. Do you use CRM (Customer Relationship Management) software? *If YES which one?*
5. Do you use an email marketing platform such as MailChimp or Constant Contact? *If YES which one?*
6. Do you have a personal conviction, preference or church standard limiting the use of websites, social media or other digital marketing methods for your business? *Please describe:*

7. What methods of communication do you use? *(checkboxes follow)*

Phone

Fax

Email

Video Call

8. How many employees do you currently have?

9. When was your company founded and why was this business started?

10. Describe your 1 year, 3 years, and 10 year goals for your company.

11. What is your company's mission statement?

12. What are your company's core values?

13. What credentials, awards, recognitions or associations does your company have?

14. Do you have a warranty program or guarantees? *(Describe:)*

15. Are you involved in trade shows or similar events during the year? *(Describe:)*

16. Number these 3 items in order of importance to your business.

Quality

Service

Price

17. What are the primary reasons you are engaging in the Rosewood Marketing Strategy Consultation?

FINANCIAL PROFILE (7 QUESTIONS)

1. Please describe your company's current financial state.

2. Do you currently have, or anticipate having difficulty paying payroll, vendors or other major business expenses?

3. In the prior 12-month period:

a. What was your Gross Sales Amount?

b. Your COGS (cost of goods sold)?

c. Gross Profit?

d. Fixed Expenses?

e. Net Income?

4. What is your current number of sales/yr (transactions)?

5. What is your target number of sales/yr (how many do you need to be profitable)?

6. How much did you invest in marketing over the past 12 months?

7. What is your Customer Lifetime Value? (*follow steps below to calculate*)

a. Take the total \$ value of sales per year and divide by the total number of transactions per year.
_____—this is your average sale amount.

b. How many times does a typical customer shop with/work with your business per year? _____

c. How many years can you reasonably expect to continue business with your loyal repeat customers? _____

Customer Lifetime Value = a x b x c _____

Example: A typical customer spends \$100 at your store each time they shop. You estimate that they shop once a month or 12 times a year. You also expect that they will continue to shop for 25 years on average.
 $\$100 \times 12 \times 25 =$ Customer Lifetime Value of \$30,000.

SALES PROFILE (6 QUESTIONS)

1. Describe a typical sale, from the first interaction with a customer to the post sale follow-up. *Please list common steps in numerical order.*
2. Where in the process you just described is the point where you become confident a potential customer will buy?
3. Is there a common point during sales where customers tend to “fall off”? *Why?*
4. How did your company develop your current sales process?
5. How strong is your current sales “pipeline”?

6. Do you typically have a backlog for your services / products?

MARKETING PROFILE (10 QUESTIONS)

1. What makes your company different from similar businesses?

2. What most defines your company reputation?

3. How do potential customers typically find out about your business?

4. What percentage of your customers are repeat customers?

5. Do you normally get referrals from past customers? *If YES please estimate the percentage.*

6. What are customers’ most frequently asked questions?

7. What marketing have you done? Rate how you feel it has worked?

Good Fair Poor

- Ads in Magazines
- Local Free Papers
- Newspapers
- Billboards
- Direct Mail
- Newsletters
- Trade Shows
- Signage
- Vehicles
- Videos
- Website

Good Fair Poor

- Website SEO
- Showroom / Store Displays
- Email Campaigns
- Company Newsletters
- Referral Program
- Prospecting
- Strategic Alliances
- Logo
- Branding
- Stationery / Forms
- Events
(ie: BBQs, Educational Classes, Tent Sales)

8. Please describe all Digital Marketing initiatives you have tried over the past 5 years.

9. What is the biggest obstacle you see to effectively market your business? *(In other words what stops you from reaching your growth goals and vision)?*

10. Do you have other marketing ideas you would like to explore that are not covered in the questions above?

CURRENT BRAND PROFILE (4 QUESTIONS)

1. When you see your logo and your graphics, how do you feel?

Embarrassed

Neutral

Very Inspired

2. Do you feel that you have consistent visuals and branding across your various business processes and marketing points today? *Describe.*

3. What "characteristics" would you use to describe your business?

4. What do you think your customers say or hear about your business?

Formal	Casual
Heavy & Impactful	Light & Bright
Contemporary	Traditional
Friendly	Authoritative
Approachable	Elite
Innovative	Conservative
Unique	Familiar
Warm	Cool
Simple	Complex
Youthful	Established
Playful	Serious
Feminine	Masculine
Industrial	Natural
Casual	Elegant
Refined	Strong

PRODUCT/ SERVICE PROFILE (7 QUESTIONS)

1. What are your most profitable products, services or offerings?

2. How do you determine the prices of what you offer?

3. Are your average prices higher or lower than your competitors? Why?
4. Describe or list the primary products and/or services your business offers? Include the approximate percentage of sales + the average price and number sold per year for each.
5. Are there additional products or services that you would consider adding?
6. Do you sell directly to your customers or use dealers/ distributors?
7. Do you offer a form of delivery or shipping service?

MARKETPLACE PROFILE (7 QUESTIONS)

1. What is the geographical region your business serves? *Why?*
2. Is there more or less demand in this area for what you offer over the past 5 years?
3. What are some changes in buyer behavior or preference you have noticed over the past year?
4. Describe some of the current trends you see in your specific industry?
5. List 3 key external factors that affect your business? *(Examples: Seasonal, geographical uniques, economy, etc.?)*
6. What are key relationship advantages your business has? *(Examples: vendors, associations, church groups etc.)*

CUSTOMER PROFILE (15 QUESTIONS, 5 ALTERNATES)

1. Describe your typical customers (*we could also call these your target customers*)

- a. What is their age range?
- b. Are they mostly men or women?
- c. Who usually decides if to buy, the husband or the wife?
- d. Are there other people who influence their buying decisions?
- e. What kind of careers do they have?
- f. What do they do in their spare time? (Hobbies, interests etc)
- g. Do they mostly live in urban or rural areas?
- h. What do they value most in life?
- i. What kind of houses do they have or cars they drive?
- j. What would they mostly read or engage in to get news, recommendations and keep up with their social scene?
- k. Do they typically fall into a specific religious or political group?
- l. Is what they buy from you a necessity, an investment or luxury to them?

2. Describe your customers needs:

- a. What are they looking for, or to do when they go shopping for a product like yours?
- b. What deeper needs do they seem to be satisfying when they buy from you?
- c. What kind of a person do your customers aspire to be, or who do they want to be seen as?

3. Does your business do B2B (Business to Business) sales? If YES answer the following questions.

- a. What is the typical business size?
- b. Where are they located?
- c. What industry(s) are they into?
- d. Who are the decision makers? (authority over budget and purchase)
- e. Who are the gatekeepers? (influences the purchase decision within the company)

COMPETITOR PROFILE (3 QUESTIONS)

1. Why do potential customers choose to do business with you over your competitors? *Explain unique advantages you have, and some solutions that give you an edge.*
2. How would you say that potential customers compare your business to your competition?
3. Are you actively losing business you should have to competitors? *What are some reasons for this?*

In the table below, please list your top 3 competitors overall (both online and physical), and evaluate each by answering the questions in the left column

Competitor Name			
What is their positive reputation in your competitive space? <i>(Strengths)</i>			
What is their negative reputation in your competitive space? <i>(Weaknesses)</i>			
How are they growing or poised to grow?			
What risks or threats to growth are they facing?			
What are their core capabilities?			
How do they best compete with you? <i>Online, Physical Location, Service, Other</i>			

Competitor Name	1.	2.	3.
How are they each uniquely different from the others?			
What is their pricing strategy? (<i>High, Medium, Low</i>)			
Do they provide/ implement their product/service to their customers in a different way than you do?			
Are there unique products or services they offer that you do not?			
How does their company advertise and get customers?			
Is their company's geographic service area different than yours? <i>How?</i>			
Is the customer group they focus on different than yours? <i>How?</i>			

Competitor Name	1.	2.	3.
What share of your potential market do they fill?			
Are there any ways you see where your business could rise up and claim opportunities you are not?			
Please list any other pertinent information about them that is not in the questions above.			

Great Work!

Your diligent efforts go a long way to allow Rosewood to develop an impactful strategy!

Next step: Discovery Session

