

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.

Project Contacts

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

About Your Company

1. Describe your company. (150 to 200 words)
2. What is your company slogan?
3. When was your company founded?
4. Provide a brief company history.
5. What is your mission statement?
6. Do you have a business plan?
7. If yes, when was it last updated?
8. Do you have specialty skills or a particular expertise?
9. Have you received any awards?
10. What is your current marketing budget?
11. What is your projected marketing budget?
12. Using distance or time, what is your service area?
13. Are you prepared to grow?

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 products and services? (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?

Your Indirect Competition

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

Difference

1. Why should your customers do business with you instead of anybody else?
2. What can your product/service 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 benefits do your customers care about?
3. What areas do you feel your company could improve on?

Your Products and Services

1. List your top 10 products or services.
2. Of these top services/products, which do you sell the most of?
3. For which products/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?

Marketing Plan Questionnaire Outline (Continued)

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Your Pricing

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

Your Customers

1. Are there any groups or networks that your target audience may belong to? (ex. professional, social, etc.)
2. What were some of the common needs/pain points that your current customers were faced with when they came to you for a solution?
3. Why do they buy from you? What is it that you offer?
4. Is there a vertical/industry you prefer not to target?
5. Are you looking to expand your coverage area? If, yes, how far are you willing to travel?
6. Do you have any additional requirements for a customer?
7. Do you perform exit interviews in the event of a lost customer?
8. Do you add to a specific marketing group/company type?
9. Are you open to targeting former/lost clients?

Customer Service

1. In what ways do you bring your prospects and clients together, online and offline?
2. What special products/services are targeted toward your loyal clients?
3. What does your company do to ensure customer satisfaction?
4. How does your company measure customer satisfaction?
5. Do you have a referral program? Please describe.
6. How does your company encourage customer referrals?
7. If you have lost customers in the past, what was the reason?
8. Describe a picture of your ideal customer experience.

Your Current Marketing

1. What is your marketing budget?
2. What would you consider to be your ultimate marketing goal?
3. How many of your employees have some part in your marketing efforts? Is this their only responsibility?
4. Are you a Chamber of Commerce member? If so, what is your chapter's name?
5. Do you have any other affiliations or memberships?
6. What, if any, marketing campaigns has your company run in the past?
7. List any current/ongoing marketing initiatives.
8. What marketing strategies do you currently employ?
9. What are your marketing strengths?
10. What are your marketing weaknesses?
11. What role does your website currently play in your marketing strategy?
12. Are you actively participating in the updating of your website?
13. What multi-media marketing materials do you have?
14. What other advertising methods do you use?
15. In what ways do you try to drive traffic from social media to your website?
16. What processes do you have in place to track and measure your marketing efforts?