



Help Me, Help You. Please answer the following questions.

**Name:**

**Address:**

**Home Phone:**

**Work Phone:**

**Email:**

**Your industry:**

**Your current occupation:**

**Your birth date:**

### **About Your Products or Services**

1. List your major products/services and prices/fees (or fee range) for each?
2. What is your Unique Selling Proposition? What do you feel makes you stand out from your competitors?
3. What are the features and benefits of your services?
4. Who is your target market?

5. Which benefits do you feel will most appeal to each of your specific target markets?
  
6. How do you get business now?
  - a. Cold Calls
  - b. Referrals/Networking
  - c. Yellow Pages
  - d. Direct Mail Letters
  - e. Advertising – Where
  - f. Seminars that your customers attend
  - g. Your Sales force provides leads/customers
  - h. Trade shows
  - i. Other

### **Business Growth Scenarios**

7. What's the quickest & easiest way for them to order from you?
  - a. phone
  - b. visit
  - c. fax
  - d. email
  - e. other
  
8. Realistically, what percentage increase in sales or number of new sales leads would make you happy?
  
  
  
  
  
  
  
  
  
  
9. Would you like more of a certain kind of customer/client but not all types of customers/clients?

## **Current Marketing and Sales Activity**

10. Please rank, in order, the sales & marketing activities that take the most time and/or cost the most money each moth. Start with the largest investment sales and /or marketing activity.
  
11. Which activities are the most effective now in terms of return on investment? And how do you know?
  
12. Which activities are the least effective now in terms of return on investment? And how do you know this?
  
13. On a scale of 1 to 10 (1=not ready, 10=ready right now), how ready are you to invest in a customer generating marketing system that will lower your marketing costs and increase the growth of your business?