

NEEDS ASSESSMENT

SALES REP INFO

Name: _____ Date: _____

TELL US ABOUT YOURSELF/YOUR BUSINESS

Account Name: _____ Social Media: _____

Contact Name: _____ Business Category: _____

Email: _____ Key Products/Services: _____

Web Address: _____

What are your top business priorities... where are you doing well, where do you need to grow?

What's your company's edge over competitors (niche)?

What is the value/worth of a customer for you?

What geographical area do you wish to target?

What time of the day – or day of the week – do you feel it is best to reach your customer?

WHAT ARE YOUR MARKETING OBJECTIVES?

- Drive website traffic
- Drive ecommerce sales
- Drive price & product
- Build brand awareness
- Build email database
- Generate sales leads
- Drive foot traffic
- Grow local market share
- Grow regional market share
- Build reputation
- Other: _____

WHO IS YOUR IDEAL CUSTOMER?

- Male
- Female
- Children at home
- Home owners
- Renters
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- <\$25,000
- \$25K-\$34,999
- \$35K-\$49,999
- \$50K-\$74,999
- \$75K-\$99,999
- \$100K+
- Geographic Area _____
- Occupation _____
- Lifestyle/Interests _____

DURING THE PAST YEAR, HAVE YOU ADVERTISED IN ANY OF THE FOLLOWING MEDIA? WAS IT EFFECTIVE?

- Newspapers _____
- TV/Cable _____
- Radio/Broadcast _____
- Yellow Pages _____
- Magazines _____
- Billboards _____
- Direct Mail _____
- Internet/Interactive _____

DURING THE PAST YEAR, WHAT INTERACTIVE PRODUCTS HAVE YOU USED TO REACH YOUR MARKETING OBJECTIVES? WHAT VENDORS/WEBSITES DID YOU UTILIZE?

- Banner Ads _____
- Video _____
- Contests (online) _____
- Directories (online) _____
- Coupons _____
- SEO _____
- SEM _____
- Email Marketing _____
- Mobile Marketing _____
- Ecommerce _____
- Social Media _____
- Daily Deals/Groupon _____
- Reputation Services _____

WHAT WAS THE GOAL OF THE CAMPAIGNS, AND WHAT ACTION DID YOU WANT THEM TO TAKE WHEN THEY SAW, CLICKED OR READ YOUR AD? WERE YOU PROVIDED ANALYTICS? WOULD YOU BE WILLING TO SHARE?

HOW DO YOU PLAN TO GAUGE/TRACK THE EFFECTIVENESS OF AN ADVERTISING CAMPAIGN?

WHAT OTHER INFORMATION ABOUT YOUR BUSINESS, YOUR GOALS, OR YOUR OBJECTIVES CAN YOU SHARE TO HELP ME CREATE AN EFFECTIVE MARKETING STRATEGY?

WOULD YOU BE WILLING TO SHARE:

Annual Sales: _____ Annual advertising budget: _____ % of market share _____

Current advertising spending: _____ % of advertising of total sales: _____

HOW A BUSINESS SHOULD CALCULATE THEIR MARKETING BUDGET

Recommendation: Spend between 2-5% of sales. Some companies spend upwards of 8-15% when warranted – especially young companies that need to invest to build their brand.

- For example: Target spends 2% of its sales on advertising, while Best Buy spends upwards of 3%. Finally, more upscale stores like Macy's typically spend on the order of 5%.
- Automakers generally spend between 2.5% to 3.5% of revenue on marketing, liquor (5.5% to 7.5%), packaged goods (4% to 10%), and every other industry.

Businesses should allocate a minimum of 3-5% of total sales to advertising and marketing. However, allocation will depend on several factors: the industry you're in, the size of your business, and its growth stage. For example, during the early brand building years retail businesses spend much more than other businesses on marketing – up to 20% of sales.

As a general rule, small businesses with revenues less than \$5 million should allocate 7-8% of their revenues to marketing.

WHAT NEEDS TO BE DONE BEFORE YOU MAKE YOUR SALES CALL?

- **CHECK OUT THEIR WEBSITE:** _____
 - a. Does the website reflect the business brand and is it functional/easy to navigate?
 - b. Who built the site and is currently maintaining it?
 - c. Check out the source code
 - i. Right click on your mouse and select “View Page Source” to view their HTML code.
 - 1. Search for their <title> tag and <meta> tags that contain keywords and a description of their site.
Do their keywords include information of what they do and sell?
 - d. Look up their website in any of the resource sites available such as: compete.com, alexa.com, etc...

- **LOOK THEM UP ON SEARCH**
 - a. Check out Google, Yahoo, Bing
 - b. Where is their website falling when you search for them by their categories of products & services?
 - c. Are they showing on the map?
 - d. Are they doing SEM – pay per click campaign?
 - e. In a search do they show up on other directories?
 - f. Where is their competition showing up in the search in relation to them?

- **FIND THEM ON SOCIAL MEDIA**
 - a. Do they have a Facebook page?
 - b. How easy is it to find them?
 - c. Is it a business page and not a personal page?
 - d. How many “likes” do they have?
 - e. How many times do they currently post?
 - f. What is the quality of their posts?
 - g. Are they getting interactivity?
 - h. Is the interactivity mostly positive or negative?
 - i. Are they on Twitter, LinkedIn, YouTube, Google+, Pinterest, Instagram, Foursquare, Yelp, UrbanSpoon, Citysearch, others?

- **DO THEY HAVE AN AD IN YELLOW PAGES?**
 - a. How large?
 - b. What does their competition do?
 - c. Are they on YellowPages.com and do they have a YellowPages.com website?

- **HAVE YOU NOTICED ANY OTHER ADVERTISING?**
 - a. Radio
 - b. TV
 - c. Billboards
 - d. Direct Mail