MARKETING STRATEGY QUESTIONNAIRE

ADVANTEX
CONSULTING
Business Strategies • Web Solutions

The Marketing Questionnaire

The Advantex Team would like to help you build your business by ensuring that the face you present to the world through your website, print media, and marketing efforts truly expresses your message and resonates with your clients. We are eager to give you new ideas for how to promote your business. We invite you to open to infinite possibilities!

This questionnaire has been created to help you see what else you can do to promote yourself and your business in these competitive times, whether on your own or with us to help you. It will take you about 25 minutes to fill out, depending on how much you would like to share with us. We trust that it will give you many ideas to consider. Complete each section in as much detail as possible and email the completed questionnaire prior to your first strategic session. It's important to base your answers on 'facts' rather than 'opinion'. If you're not sure, take the time to either find the accurate answer, or make a note that the answer is based on opinion.

This questionnaire is divided into the following sections:

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1. Background and Business Objectives

Having goals and objectives is the way to measure the success of your business and gives an outline of what you want to accomplish.

1. What business are you in?

   - ☐ Retail
   - ☐ Real Estate
   - ☐ Manufacturing
   - ☐ IT
   - ☐ Education
   - ☐ Finance
   - ☐ Food and Beverage
   - ☐ Medical
   - ☐ Health and Wellness
   - ☐ Publishing
   - ☐ Other _____

2. What needs does your business meet in the industry?

   _____

3. What are your primary services and/or products that you provide?

   _____

4. What are your most important business objectives for the next two years?
   - ☐ Profitability
   - ☐ Productivity
   - ☐ Customer Service
   - ☐ Employee Retention
   - ☐ Growth
   - ☐ Change Management
   - ☐ Marketing
   - ☐ Other, please describe:

     _____

5. What compelled you to start your business?

   _____

2. Mission and Vision

The most important first step to take before marketing your business is to know where you are going as an organization.

1. What is the mission of your business or organization?

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2. What would you like to accomplish and what will your goal look like when you reach it?

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3. Image and Branding

This refers to your logo, the colours, the symbols, and general look of your website, brochures, letterhead, and other marketing materials. It is the message that you would like the world to understand and recognize whenever they see your company online, in print, or in media. When you think of Harley-Davidson, a totally different picture comes to mind than when you think of Betty Crocker.

1. Do you have a clear image and branding that pleases you?
   - ☐ Yes
   - ☐ No

   If no, we can help you. What do you feel is wrong with your current branding?

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2. Does your image and branding reflect who you are and what you do now rather than what you have done in the past?
   - ☐ Yes
   - ☐ No

3. Is your branding consistent? Do all your marketing materials, such as brochures, letterhead, business cards, ads, and website have the same look, feel, and logos?
   - ☐ Yes
   - ☐ No

   If no, how can we help?

4. Do all your marketing materials have your website address and Social Media (like Facebook or LinkedIn) names on them?
   - ☐ Yes
   - ☐ No

5. Marketing Message

Your marketing message should be used in all your external communications. It starts with knowing the wants, fears, problems, and needs of your target market and ends by crafting a message that speaks to those problems in a compelling and believable way.

1. What does your identifies target audience know and believe about your brand?

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2. What is the single most important message that you must communicate to ALL of your target audiences?

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3. What kind of brand personality do you want to portray in your communications?
   - ☐ Purist/Sincerity
   - ☐ Pioneer
   - ☐ Conqueror
   - ☐ Rebel/Excitement
   - ☐ Sophistication
   - ☐ Competence

6. Market/Industry

1. What is the market opportunity?

---

2. What percentage do you think you can increase your market share by?
   - ☐ 10-25%
   - ☐ 25-50%
   - ☐ 50-100%

3. What are the key industry trends that are fuelling your success? E.g. the rising impact of digital.

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4. How will the economic climate affect your business?

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5. Is your business or market affected by business cycle or seasons? If so, please describe how it is affected.
   - ☐ Yes
   - ☐ No

6. Target Audience

In marketing, a target audience is the primary group of people that your business or organization is aimed at appealing to. What type of people come to your website and support your organization? How do they find out about you? By phone, mail, web, television, radio, in stores, at restaurants? What are their ages? Are they local, national, or all over the world? What do they like? More specifically, what do they like most about YOU that inspires them to join your organization, purchase your products, or donate money?

1. Who is your audience?

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2. Are you confident that you are reaching them?
   - ☐ Yes
   - ☐ No

   Please explain how you monitor this:

3. What market segments are you targeting (list segment name and characteristics)? What segments are you not targeting?

---

4. What is your customer's primary reason for buying or wanting to use your product or service?

---

5. Why would someone prefer your offering versus that offered by the competition, what is your competitive advantage?

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6. Are there any issues or concerns that the target audience might have regarding this type of product or service?

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7. Competitive Analysis

1. What categories of competition threaten your success? Label each category, and identify its key characteristics. Prioritize the categories from greatest to least threatening.

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2. List 3 companies that pose the greatest threat, and how do they differentiate themselves? What strategic or tactical elements do they use that threaten your success? List the strengths and weaknesses for each of these elements.

---

3. Are you creating barriers to entry into the marketplace?
   - ☐ Yes
   - ☐ No

8. Client Needs Analysis

1. What need is your offering designed to fill?

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2. What features and associated benefits does your offering provide?

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3. What improvements can you make to your offering to better meet customer needs?

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4. What new offerings would your customers most like you to develop?

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9. Sales and Buying Process

1. Check the processes used for selling your services or products.
   - ☐ Direct personal sale
   - ☐ Direct online sale
   - ☐ Indirect through channels
   - ☐ Other, please explain _____
2. Who is involved, both from your company and from your sales channel partners, in each step of the sales process?

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3. How does your target audience buy your type of offering?
   - ☐ the purchase is an impulse buy
   - ☐ planned purchase

4. What purchase process steps do the members of your target audience follow? Does this process vary based on the vendor that they select? If the process does vary, explain how and/or why?

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5. What buying criteria does your target audience use to select an offering?
   - ☐ What is it?
   - ☐ What does it do?
   - ☐ Why do I need it?
   - ☐ What will I get?
   - ☐ Why should I buy it from you?
   - ☐ What's the price?
   - ☐ What's the deal?

10. Marketing Plan

To be most effective, a marketing plan is a formal written document that details the actions necessary to achieve your marketing objectives. It can be for a company, a product or service, a brand, or a product line. The essence of the process is that it moves from the general to the specific; from the overall objectives of your organization down to the individual action plan for a part of one marketing program. Effective PR flows out of a solid marketing plan.

1. Do you have a specific marketing plan that is currently driving your marketing efforts?
   - ☐ Yes
   - ☐ No

   Please explain: _____
2. Do you know your *Unique Selling Proposition* – that which makes you different from all your competitors?
   - ☐ Yes
   - ☐ No

   If yes, what is it?
3. Do you have a *story* that will capture the hearts and interest of potential clients?
   - ☐ Yes
   - ☐ No
4. If yes, is your story expressed in your marketing materials?
   - ☐ Yes. How?_____
   - ☐ No

11. General Marketing

1. Have you set up an annual marketing budget?
   - ☐ Yes. Amount (general range)_____
   - ☐ No. I would like to help knowing how much is appropriate and how to spend it effectively.
   - ☐ No. I know one is necessary.
   - ☐ No. Is a marketing budget necessary for me?
2. Do you have a media kit? *(check all that apply)*
   - ☐ Yes, printed
   - ☐ Yes, online

- ☐ No, and I know that one is necessary.
- ☐ No, and is a media kit necessary for me?

3. Do you have a website?
   - ☐ Yes, and I'm happy with it.
   - ☐ Yes, and I am ready to move to the next level with it.
   - ☐ Yes, and I know it will require a major overhaul soon.
   - ☐ No

12. Traditional Marketing

This part of the questionnaire deals with common, "low-tech" ways of promoting your business. You are probably bombarded by many offers of advertising and promotion on a daily basis, so it important that you understand that if you use any of these methods, you will really have to stand out to be remembered!

1. Which of the following means do you currently use for your traditional marketing?

PRINT

- ☐ Brochure
- ☐ Calendars
- ☐ Cards
- ☐ Coupons
- ☐ Community Papers
- ☐ Direct Mail
- ☐ Directories of professional associations
- ☐ Flyers
- ☐ In-flight audio advertisements
- ☐ Magazines
- ☐ Mail order catalogues
- ☐ Newsletter
- ☐ Newspaper ads
- ☐ Press releases
- ☐ Supermarket receipts
- ☐ Trade magazines
- ☐ Yellow page ads

WORD OF MOUTH MARKETING

- ☐ Conventions
- ☐ Customer Referral Programs
- ☐ Fairs and festivals
- ☐ Fan clubs
- ☐ Focus groups
- ☐ Multilevel marketing
- ☐ Networking meetings
- ☐ Panel discussions at professional meetings
- ☐ Product placements
- ☐ Refer-a-friend program
- ☐ Seeding
- ☐ Making comments on forums

- ☐ Getting bloggers to write about you
- ☐ Inspiring thought leaders in your field to mention what you do in their writing or presentations
- ☐ Seminars
- ☐ Sponsorships
- ☐ Testimonials
- ☐ Tradeshows
- ☐ VIP program

CONTESTS AND GIVEAWAYS

- ☐ Contests
- ☐ Giveaways
- ☐ Rebates
- ☐ Sweepstakes

JOINT VENTURES – companies teaming up to so:

- ☐ Joint events
- ☐ Promotions
- ☐ Sales
- ☐ Other

OFFBEAT

- ☐ Stadium advertising
- ☐ Blimps
- ☐ Balloons
- ☐ Movie theatre commercials

OUTDOOR ADVERTISING

- ☐ Billboards
- ☐ Signs
- ☐ A-frame sidewalk signs
- ☐ Roadside person in costume with sign
- ☐ Transit advertising

PUBLICITY EVENTS

- ☐ Book signings
- ☐ Demonstrations
- ☐ Parties
- ☐ Presentations and speaking events
- ☐ Workshops and seminars
- ☐ Other

2. Is what you are doing to promote your organization:
   - ☐ Integrated – working together well?
   - ☐ Part of a larger plan?
   - ☐ Reinforcing your brand consistently?
   - ☐ Effective?

3. Are you monitoring your marketing success? How?
   - ☐ Number of new customers
   - ☐ Number of referrals
   - ☐ Number of phone calls
   - ☐ Number of coupons used
   - ☐ Number of email requests or responses
   - ☐ Number of feedback forms submitted from website
   - ☐ Sales dollars
   - ☐ Volume of comments on social media
   - ☐ Other _____

13. Online Marketing

Websites have changed. With faster internet access and with all the new technology introduced over the past few years, the expectations of website visitors have changed. People expect content on sites to change frequently. They expect to be entertained and see interesting graphics. Old-style websites stand out, and not in a good way. This section will help you discover how many ways you can add to your basic web presence, and use your website to draw new visitors, then keep them coming back for more of what you have to offer.

1. What is the purpose of your web presence?
   With a clear vision of your purpose, it is easier to stay on target with your message and have proper organization of the site.

   (Check all that apply)

   - ☐ Building community
   - ☐ Customer service
   - ☐ Entertainment
   - ☐ Information
   - ☐ Product Sales
   - ☐ Providing services
   - ☐ Teaching or training
   - ☐ Vendor services
   - ☐ Other _____

2. Is the audience for your website the same as for your other types of audiences or are you aiming for a different demographic – or different demographics on different sites?

_____

3. Which of the following vehicles are you using as part of your web presence? *(Check all that apply).*
   - ☐ *Blog*
   - ☐ *Forum*
   - ☐ *Gallery*
   - ☐ *Online Store*
   - ☐ *Your own website*

SOCIAL MEDIA

This phenomenon focuses on building community. Originally started for students, these sites became a draw for adults and for marketers when they discovered how easy it was to reach their audience if they chose the right type of site and used it properly to promote their wares. These are great for creating interest groups, and they aren't for every business or every audience.

- ☐ Facebook
- ☐ LinkedIn
- ☐ Myspace
- ☐ Twitter
- ☐ Instagram
- ☐ YouTube
- ☐ Other _____

4. Is what you are doing on your sites:
   - ☐ Integrated – working together well?
   - ☐ Part of a larger plan?
   - ☐ Reinforcing your brand consistently?
   - ☐ Changing often enough to drive repeat visits?
   - ☐ Monitored for appropriate posts.

5. Do you currently use a CRM or marketing automation platform?
   - ☐ Yes, which one:
     - ☐ Salesforce
     - ☐ Hub spot
     - ☐ Active Campaign
     - ☐ Other _____
   - ☐ No

6. Do you use any of the following features on your website(s)?

   WEBSITE FEATURES
   - ☐ eNewsletters
   - ☐ eZines (electronic magazines)
   - ☐ Events calendar
   - ☐ Flash productions
   - ☐ Free downloads
   - ☐ Mail list opt-ins (subscribe)
   - ☐ Online memberships
   - ☐ Podcasts
   - ☐ Video clips
   - ☐ RSS feed
   - ☐ Search Engine Optimisation (SEO)

7. Do you advertise online?
   - ☐ No, I'm not interested.
   - ☐ No, I would like to.
   - ☐ Yes, this is where I advertise:

- ☐ Google Adwords, AdSense
- ☐ Bloglines
- ☐ Yahoo Search Marketing
- ☐ Online Directories
- ☐ Other _____

☐ Yes, and I would like to make it more effective.

8. Are you monitoring the success of your online strategy?
   - ☐ No
   - ☐ Yes, and this is how:
     - ☐ Website traffic statistics
     - ☐ Online saes
     - ☐ Comments on blogs
     - ☐ Memberships
     - ☐ Size of email list
     - ☐ Other _____

9. How many leads do you generate per month from all your marketing channels?
   - ☐ 50-500
   - ☐ 500-1000
   - ☐ 1000+

10. What is your average monthly spend?
    - ☐ Less than $2k
    - ☐ $2-5k
    - ☐ $5-10k
    - ☐ Over 10k

14. Pricing

1. What is your current pricing structure and do your customers understand it?

_____

2. Which of your competitors is considered the price leader?

_____

3. What can be done to reduce costs without compromising quality or service/product?

_____

4. What is the perceived value of your offering?

_____

5. What service/s do you currently include in the price of your product?

_____

6. What services can you consider now and in the future?

_____

Your Marketing Conversion Analysis

Marketing Pillar	Enquiries	Conversion Rate	Customers	Average Sale Value	Total Revenue	Positive Effect on Business	Current Performance	Investment per Enquiry
	(a) #	(b) %	(c) #	(d) $	(e) $	1-10	1-10	(f) $
Example:	200	0.25	50	1000	50,000	8	4	30
Active referral system								
Cold calling								
Direct mail								
Existing Customers								
Joint venture								
Online Advertising								
Content Marketing								
Email Marketing								
Website								
Joint venture								
Magazine								
Newspaper								
Pamphlet distribution								
Radio								
Sales people								
Television								
Other								
Total								

To calculate the above figures:

Conversion rate:	b = c ÷ a x 100	Average Sale Value:	d = e ÷ c Total
Customers:	c = a x b	Revenue:	e = c x d

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