AMPLIFIED

TARGETED DISPLAY | SEARCH MARKETING | SOCIAL MEDIA | WEB DESIGN & DEVELOPMENT | EMAIL MARKETING | CREATIVE & FULFILLMENT

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 is your company's edge over competitors? What do you do better? Different?

_____

_____

_____

What is the value/worth of a customer for you? Customer Lifetime Value (CLV)

For example: $100 avg monthly spend * 25% margin ÷ 5% monthly churn = $500 LTV

_____

_____

_____

what geographical area do you wish to target? (Top performing zip codes or radius from your location)

_____

_____

_____

What time of the day – or day of the week – do you feel it is best to reach your customer? I.e. Weekdays Only?

_____

_____

_____

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WHAT ARE YOUR MARKETING OBJECTIVES?

- Drive website traffic
- Drive ecommerce sales
- Drive price & product
- Build brand awareness
- Build email database
- Generate sales leads
- Gain phone calls / forms
- 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/Other _____

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

- Targeted Display Ads _____
- Video (YouTube, CTV) _____
- Remarketing (Site + Social) _____
- SEO _____
- PPC/Google Ads _____
- Email Marketing _____
- Mobile Geo Location _____
- Google Shopping _____
- Social Media Management _____
- Social Media Advertising _____
- Reputation Management _____

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

- Newspapers _____
- TV/Cable _____
- Radio/Broadcast _____
- Phone Book _____
- Magazines _____
- Billboards _____
- Direct Mail _____
- Other _____

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

I.e. for E-Commerce, it could be online sales. For other types of business it could be phone calls or form submissions.

_____

_____

_____

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.

Source: U.S. Small Business Administration, SBA.gov, January 2013

HOMEWORK BEFORE THE CALL

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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.
e. Are there plenty of CTA (opportunities for Call to Action) such as click to call, email, and forms?

LOOK THEM ON SERP (Search Engine Results Pages)

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 a pay per click / Google Ads campaign?
e. In a search do they show up on other directories?
f. How do they show up in the organic / unpaid section? 4
g. 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? I.e. do people like, comment, and share?
h. Is the interactivity mostly positive or negative?
i. Are they on Twitter, LinkedIn, YouTube, G+, Pinterest, Instagram, Foursquare, and Yelp?

DO THEY HAVE AN AD IN YELLOW PAGES OR ANOTHER PHONE BOOK?

a. How large is the ad?
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
e. Digital Marketing