

Marketing Plan Questionnaire Outline

To help you prepare in advance, we've compiled an outline of all the questions below. We recommend reviewing and gathering any necessary information before you begin completing the forms online.

When you're ready, please visit the website indicated and upload your completed worksheets to begin the questionnaire. We appreciate your time and look forward to learning more about your business.

<https://www.joomconnect.com/mpstep1>

Step 1:

Worksheets

Please complete the following worksheets (#4 is optional). These should be submitted prior to moving on to the next step.

1. SWOT Analysis
2. Ideal Customer
3. Direct Competition
4. Personal Celebration

Step 2:

A. Project Contacts

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

B. About Your Company

We'd like to learn more about your company and its core values. Understanding your history, mission, and vision will help us capture the essence of what you do and how you stand out in the marketplace.

1. In a quick, 30-second 'elevator pitch,' how would you describe your company to someone unfamiliar with your business?
2. If you had to capture your business in eight words or fewer, what would they be?
3. When was your company founded?
4. Provide a short history of your company from founding to present, highlighting major milestones.
5. What is your mission statement?
6. What is your company slogan or tagline (if any)?
7. Do you have a formal business plan, and when was it last updated?
8. What broader business goals do you have beyond your marketing objectives?
9. What makes your business unique in the market? Do you offer any specialty services or expertise?
10. Have you received any awards or notable recognition? If so, please describe.
11. Using distance or time, what is your current service area?
12. Are you prepared to grow, and how do you plan to measure it (e.g., expanding geography, adding new services, entering new verticals) If so, please describe.
13. What are your company's core values, and how do they influence your day-to-day decisions?
14. Do you have any documented brand guidelines (e.g., logo usage, color palettes, messaging style)?

C. About Your Sales Process

Your sales process is critical to your overall success. We want to understand how you generate leads, move prospects through the pipeline, and retain customers.

1. Do you have a structured process for lead generation? If yes, please describe it in detail.
2. How do you typically convert a lead/prospect into a paying customer? Describe any formalized steps or checkpoints.
3. Do you have a process for encouraging existing customers to purchase additional services or products? If yes, please describe.

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4. On average, how long is your sales cycle (from first contact to closing the deal)?
5. Do you maintain a prospects list, and how regularly is it updated?
6. What are the primary reasons a lead doesn't close?
7. What initiatives or programs do you have in place to help retain your current customers?
8. How do you track and measure sales performance (e.g., pipeline velocity, close rate, average deal size)?
9. Do you offer any incentives or promotions to encourage potential clients to sign on?
10. If known, what is the average lifetime value (LTV) of a customer?

Step 3:

A. Your Indirect Competition

Identifying your indirect competitors helps us see the bigger picture of your market.

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

B. Differentiation

We'd like to pinpoint what makes you truly different from anyone else in your field. Highlighting these unique qualities helps us craft a compelling message that resonates with your audience.

1. Why should customers choose you over anyone else, and what keeps them coming back?
2. What can your services/products do for your customers that others cannot?
3. Which specific offerings make you truly different? For instance, specialized problem-solving, unique products, targeted market niches, special offers, strong company values, distinctive packaging, or exceptional service?
4. How do you communicate these unique differentiators to prospects and existing clients?

C. Promises

Every brand has certain commitments or guarantees that define its relationship with customers. We want to clarify what you promise and where there might be room for improvement.

1. What can you guarantee your customers that no one else can?
2. Which features and benefits do your customers care about most?
3. Which areas do you feel your company could improve on, and what plans (if any) are in place to address these improvements?
4. Which areas might fall short of your clients' expectations, and how do you plan to resolve this?
5. What internal procedures would you like to improve, and do you have a timeline or plan to implement those improvements?

Step 4

A. Your Products and Services

These questions help us understand what you currently provide, how you package these services, and your plans for the future.

1. How do you currently offer your services—through all-inclusive packages, standalone agreements, or both?
2. If you offer standalone services, which ones would you most like to see a sales increase for?
3. List your top 10 services / packages in order of popularity or revenue.
4. Are you considering adding any new services? If so, please describe.
5. What is your time frame for rolling out these new services?

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6. What are the most common misconceptions prospects have about your brand or services?
7. How do you develop or refine new services? Is there a research and testing process?
8. Do industry trends or seasonal factors significantly impact demand for your services?

B. Your Pricing

Pricing plays a big part in how your business is perceived and how you compete in the market. We'd like to explore how you structure your pricing, how it compares to competitors, and how customers perceive its value.

1. Are your prices easy to understand, or do customers find them confusing? If it's confusing, why?
2. How is your pricing set (e.g., per seat, per site, per project)?
3. How do your prices compare with those of your direct competitors?
4. Do you consider your pricing above, below, or in line with typical industry standards?
5. Are most customers satisfied with your pricing, or do they often push back or request discounts?
6. Is there any additional information regarding your pricing that you'd like to share?
7. Do you offer special pricing tiers, discounts, or bundle packages?
8. Do you adjust pricing based on customer size, industry, or contract length?
9. How do you typically handle negotiations on pricing?

Step 5

Your Customers

Gaining a deeper understanding of your ideal customer and the segments you serve will help us tailor messages and strategies more effectively.

1. How would you describe your ideal client in terms of industry, size, location, and common challenges?
2. Are there any groups, networks, or associations (professional, social) that your target audience is likely to be part of?
3. What are the common needs or challenges your current customers typically face when they approach you?
4. How do you define small, medium, and large businesses—by number of employees, workstations, servers, etc.?
5. Is there a particular business size you prefer working with? Why?
6. Is there a vertical or industry you prefer not to target? If so, why?
7. Do you have any additional requirements or qualifications you look for in a potential customer?
8. Do you perform exit interviews when you lose a customer? If so, what have you learned from them?
9. Are you open to re-engaging with former or lost clients?
10. Have you found greater success in any particular industry or vertical?
11. Do you have case studies or testimonials from current clients highlighting your value?

Step 6

Customer Service

We want to learn about your processes for keeping customers satisfied, addressing concerns, and maintaining strong relationships over time.

1. Describe what an ideal customer experience looks like, from a prospect's first contact through ongoing support.
2. What does your company do specifically to ensure customer satisfaction?
3. How do you measure or track customer satisfaction (e.g., surveys, online reviews, other)?
4. Do you have any formal or informal tactics to encourage clients to speak positively about your company to prospects (testimonials, referral incentives, etc.)?
5. What strategies do you use to maintain customer loyalty and retention on a day-to-day basis and in the long term?
6. Do you have a standardized process for documenting and resolving customer feedback or complaints?
7. Do you conduct regular business reviews with clients (quarterly, annually, etc.)?

Marketing Plan Questionnaire Outline (Continued)

8. When you have lost customers, what are the most common reasons they left?
9. How do you handle escalations or serious service issues?

Step 7

Your Current Marketing

We want to review your current marketing efforts—what's working, what isn't, and where the biggest opportunities lie. This information will allow us to create a t

1. What is your primary marketing objective (e.g., brand awareness, lead generation, customer retention)?
2. How much do you currently spend on marketing annually, and what is your projected budget going forward?
3. How many employees are involved in marketing efforts, and in what capacity?
4. Are these employees solely focused on marketing, or is marketing one of multiple responsibilities they handle?
5. Is there clear communication and goal-setting between your marketing and sales teams?
6. Have you pursued any marketing initiatives in the past year, and what were the results?
7. Have you purchased third-party marketing campaigns or lists? How did they perform?
8. List any current or ongoing marketing strategies (e.g., email campaigns, social media, direct mail, PPC ads).
9. Which marketing metrics do you currently track (e.g., website traffic, conversion rates, ROI, lead volume)?
10. Where do you excel in marketing? (e.g., consistent messaging, responsiveness, brand voice)
11. Where do you struggle in marketing? (e.g., lack of clarity, inconsistent branding, slow follow-up)
12. What does a successful marketing campaign look like to you?
13. What tools or software do you use to manage your marketing (e.g., HubSpot, Mailchimp, Google Analytics)?
14. What role does your website play in your marketing strategy, and how do you drive traffic to it?
15. How frequently do you update your website content and messaging?
16. Do you have any videos, podcasts, or other multi-media marketing materials?
17. Which other advertising methods do you use (print, TV, radio, outdoor, etc.)?
18. How do you leverage social media to drive traffic to your website or generate leads?
19. What processes or tools do you have in place to track and measure the success of your marketing efforts?
20. Do you have a formal referral program? If so, how is it structured, and how do you reward clients who give successful referrals?
21. Are you a member of a Chamber of Commerce? If yes, which one(s)?
22. Is there a specific competitor's marketing initiative or campaign that you've admired or felt envious of? What about it stood out?
23. Do you have any other affiliations or memberships that could support networking or marketing efforts?
24. Do you have established brand guidelines, and have you used any marketing automation platforms? If so, please specify.
25. Do you have a content marketing strategy (e.g., blogging, newsletters, white papers), and how often do you publish?
26. How do you nurture leads once they're in your pipeline (e.g., drip email campaigns, periodic follow-ups)?
27. Are there trade shows, conferences, or local events you regularly attend or sponsor?