



Key questions when meeting a new client

Please can you complete this questionnaire, it will help us to grow your business in the right direction, based on fact and in line with your values and company vision.

YOU

Why do you do what you do?

Why do you work for the Company (Owners too)

What do **you** do well?

VALUES AND PURPOSE

What is the purpose of your company?

What are the values of your company?

What does the Company do well?

Does the business have a vision statement or tagline (or both? Please write down)

Are you looking at growing/ sustaining or exiting this business? Please explain answer



PRODUCT OR SERVICE PRIDE

Do **you** believe in your products and services?

What makes the product or service the business sells an absolute stand out?

What would you do if you could improve your products or services and why?

WHO

Who actually buys from you (industry and exact persona* please - actual data please)

Who do you want to buy from you (industry and exact persona* please)

*Persona means what is their job title, what is their responsibility, give them a name, are they male/ female, how old are they, where do they live, what do you think they read, do you think they are online consumers or more traditional in their approach to procuring products and services? Describe them in detail



CUSTOMER SERVICE

Do you think that your customer service is impeccable?

What do you think the company could do to improve customer service

What do you think you could do personally to improve your customer service

SALES

Can you identify 3 new opportunities in front of you right now?

1.

2.

3.

What do you think should be done to win those opportunities?

Do you think the company does enough to win new work? If not what would you do better?

Do you think you have the right tools to win new work? If not - explain what you need.

Does your business have a CRM? If so - which one and is it used properly



COMPETITION

Do you know what your competitors are up to and do they thrive in the marketplace?

Do you think your offer is competitive? If not - do you know what you are up against?

MARKETING

Do you think the Company brand is strong?

Do **you** identify with the brand and the values of the company?

Do you think that your clients identify with the brand and the values of the company?

Do you think that you say what do to solve your client's problems in your marketing?

Do you think your marketing is good enough?

Do you think your marketing is accurate and up to date?

If you could do anything to improve your marketing - what would you do?



MARKETING ACTIVITIES

What marketing does your company have?

Y N

Website

Brochures

Social Media

Email Marketing

SEO

Google ad words

Networking

Tradeshows

Case Studies

Vehicle signage

Building Signage

Blogs

PR

Cold Calling

Radio

TV

Other - please describe

Which activity do you think works the best?

Which activity do you think needs improvement?

Does your business run effective marketing campaigns? If so please describe the last one and what activities you used to run the campaign

Do you measure your results each month? If so - what do you think they are showing you?



PEOPLE

Do you think that you have the right people in the right positions in your company? If not what do you think should change? Be specific.

Do you think the business is well managed? If not why not?

YN

Do you think the office is clean and tidy?

Do you think you double handle tasks?

Do you think there are better ways of working?

Do you have good systems?

TIME

Do you think that time is managed well in your business?

If you are not the Boss, what would you change about time management to improve the output of the business?

FAILURES

What have you done with your business over the past 10 years that has absolutely failed?

What did you learn from this / these experiences?
