Always-on Marketing® Needs Assessment for

_____

Company Name

_____   _____   _____

Name   Title   Telephone, ext.

Marketing Overview

What marketing style do you prefer? Conservative ❑❑❑❑❑ Cutting-edge

Please rate your overall marketing effectiveness: Ineffective ❑❑❑❑❑ Very Effective

How important are these marketing channels to the success of your company?

Not Important   1   2   3   4   5   Very Important

E-mail	_____	Direct Mail	_____	Public Relations	_____
Pay Per Clicks	_____	Print Ads	_____	TV/Radio	_____
Organic Search	_____	Fax	_____		

How effective are you at using these marketing communication channels?

Not Effective   1   2   3   4   5   Very Effective

E-mail	_____	Direct Mail	_____	Public Relations	_____
Pay Per Clicks	_____	Print Ads	_____	TV/Radio	_____
Organic Search	_____	Fax	_____		

What do you feel is the optimal schedule for launching campaigns employing…

	Daily	Weekly	2 Weeks	Monthly	Quarterly
E-mail	_____	_____	_____	_____	_____
Paid Clicks	_____	_____	_____	_____	_____
Direct Mail	_____	_____	_____	_____	_____
Public Relations	_____	_____	_____	_____	_____
Other _____	_____	_____	_____	_____	_____

How often do you currently launch marketing campaigns employing…

	Daily	Weekly	2 Weeks	Monthly	Quarterly
E-mail	_____	_____	_____	_____	_____
Paid Clicks	_____	_____	_____	_____	_____
Direct Mail	_____	_____	_____	_____	_____
Public Relations	_____	_____	_____	_____	_____
Other _____	_____	_____	_____	_____	_____

Response rate assessment:

	Targeted Response Rate	Actual Response Rate	Monthly Leads	Budget
E-mail	_____%	_____%	_____	$_____
Paid Clicks	_____%	_____%	_____	$_____
Direct Mail	_____%	_____%	_____	$_____
Fax	_____%	_____%	_____	$_____
Print Ads	_____%	_____%	_____	$_____

What data-cleansing steps do you employ before launching campaigns?

___ Clean up abbreviations such as Blvd and Prkwy
___ Call each company to identify correct decision makers
___ Remove unwanted names (competitors, discrete customers, etc.)

Before launching campaigns, which of the following do you employ?

___ Ask company employees to provide feedback
___ Seek feedback from selected customers and prospects
___ Sample overall effectiveness using several small runs
___ Test multiple offers

Lead Tracking, Qualifying and Nurturing

How do you track sales leads?

___ Currently there is no formal process
___ Manually, using paper or an Excel spreadsheet
___ Use database or contact manager such as ❏ ACT! ❏ Goldmine ❏ Access ❏ Outlook
___ Use Web-based contact manager such as ❏ SalesForce.com ❏ NetSuite.com

How would you rate your current lead-tracking system?

Needs total revamping ❏❏❏❏❏❏❏❏❏❏ Works perfectly

What are your best sales tools? (e.g., brochures, case studies, Website, trade shows, etc.)

1_____   5_____

2_____   6_____

3_____   7_____

4_____   8_____

What criteria do you include when qualifying prospects?

MINT = Money, Influence, Need and Timing

I consider the prospect's ❑ budget ❑ role in company ❑ need ❑ timing

Sales Pitch

Please describe what you're selling (elevator pitch):

_____

_____

_____

_____

Sales Process

1) What is your monthly sales revenue target? $_____

2) What is the average price of a typical sale? $_____

3) Number of deals needed to hit sales goal:
   Divide line 1 by line 2   _____

4) Percentage of quotes that become a sale: _____%

5) Number of quotations needed to hit sales goal:
   Divide line 4 by line 5 (i.e., 5% = .05)   _____

6) Percentage of inquiries/leads quoted: _____%

7) Number of inquiries needed to generate enough proposals:
   Divide line 6 by line 7   _____

8) Your average direct marketing response rate (eg,1/2% = .005):   _____

9) Number of monthly touches needed to feed lead pipeline:
   Divide line 8 by line 9   _____

Note: A touch is a contact made via mail, email, phone or search-engine impression.

How long is a typical sales cycle? (inquiry to close) _____

How short would you like it to be? _____

What is your existing sales process? (please list the key steps)

1_____   5_____

2_____   6_____

3_____   7_____

4_____   8_____

Web Presence

How well does your Website...

Not well   1   2   3   4   5   Very well

___ Help visitors find answers to frequently asked questions
___ Circulate important sales and marketing collateral material
___ Encourage visitors to request more information or a contact
___ Entice visitors to post their names into an online marketing database
___ Establish rapport with Website visitors (i.e., building digital relationships)

How well is your Website indexed among search engines?   Poorly ❑❑❑❑❑ Well

The Bottom Line

If you could optimize your sales and marketing effectiveness, how would it effect?

Sales revenue   **Overall bottom line**
❑❑❑❑❑❑❑❑❑❑❑   ❑❑❑❑❑❑❑❑❑❑❑
No effect   Greatly   No effect   Greatly

What budget could you set aside for achieving your new objectives?

❑❑❑❑❑❑❑❑❑❑❑
$1,000 a month $12,000 a month

Within what time frame would expect to see results if you employ a…

	1 yr	6 months	90 days	30 days
Full-time employee	_____	_____	_____	_____
Part-time employee	_____	_____	_____	_____
Marketing agency	_____	_____	_____	_____
Consultant	_____	_____	_____	_____

Please fax completed survey to 734.268.4406 or e-mail dave@a2.com