



## New Client/Prospect Questionnaire, B2C

*Welcome to Your Revenue Growth Team. We are excited to **begin** or **explore** a relationship. We have a number of questions to investigate with you to learn more about your goals and needs. Let's start.*

### GENERAL INFORMATION

What are your overall company goals

What problems does your product/service aim to solve; why do customers need your products?

What are your biggest sellers?

What are your biggest non-sellers?

What are your biggest challenges?

How long have you been facing these challenges?

What has your growth rate been to date?

What's been keeping your firm from achieving its goals?

What regions/geography do you serve?

## COMPETITION AND UNIQUE SELLING PROPOSITION

Describe the competitive landscape

What does your company do better?

What do competitors do better?

What are your product/service strengths?

What are your product/service weaknesses?

What's your unique value prop? Why should a customer buy from you?

How are you priced versus competitors?

Are you considered luxury, moderate, or discount with your brand?

## TARGET AUDIENCE

Why are your best customers loyal?

What loyalty/retention strategies/processes do you have in place?

Describe in some detail your ideal target customer profile

Primary buyer- demographics, psychographics

Secondary buyers- demographics, psychographics

How should your prospects feel about themselves when they buy your products? Examples below

“solved my need”

“saved money”

“great value”

“Ecstatic”

## MARKETING & SALES

Have you used other consultancies or agencies in the past and what has been your experience?

Describe your discount/promotional tactics that you currently deploy?

Rank the Priorities 1-3. 1 low, 2 moderate, 3 high

More web traffic	1	2	3
More cart to purchases	1	2	3
More effective media and digital strategy	1	2	3
More engaging and effective website	1	2	3

What Metrics or KPIs are you currently tracking?

Are you aware of your marketing/website conversion rates?

Have you invested in SEO and how would you gauge the results?

What current marketing tools/platforms (Amazon, shopping channels, Email, analytics, conversion) is your firm using?

What current website/ecommerce platforms/tools (CRMs, product platform, major plugins/apps) is your firm using?

In general, what are your biggest marketing challenges?