



New Client/Prospect Questionnaire, B2B

*Welcome to Your Revenue Growth Team. We are excited to **begin** or **explore** a relationship. We have a number of questions to gain an understanding to help learn more about your goals and needs.*

GENERAL INFORMATION

What are your overall company goals?

What problems does your product/service aim to solve?

What are the biggest challenges you would like to explore with us?

How long have you been facing these challenges?

What is your pricing model? (SaaS, License, Professional Services, Customer Support)

How much of your business is new vs. add on /upsell in the current customer base.

What has your growth rate been to date?

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

What regions/geography do you serve?

What market segments do you focus on (SMB, Mid-Market, Enterprise)

What is the % by market segment on an annual bases.

COMPETITION AND UNIQUE SELLING PROPOSITION

Describe the competitive landscape: key competitors; how competitive, what's your niche, etc.

What does your company/product do better?

What do competitors proclaim they do better?

What are your product/service strengths & differentiators?

What are the areas of product/service which could be of improved upon ?

What are common objections why they won't buy? (Timing, Competition, Business Value, Price)

How are you priced versus competitors?

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 Ideal Customer Profile (ICP)

Primary decision-makers/ persona's- titles, pain points, business challenges

Influencers/persona's- titles, pain points, business challenges

How are they solving their problems now?

Why do your best customers choose you?

MARKETING & SALES

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

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

More web traffic and qualified leads	1	2	3
Better awareness of our solutions	1	2	3
More sales opportunities	1	2	3
Higher close/win rates	1	2	3

What are the top Sales & Marketing 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 (Email, analytics, conversion, website) is your firm using?

What current sales tools (CRMs, customer engagement, sales enablement prospecting, forecasting) are you using?

In general, what are your biggest marketing challenges?

In general, what are your biggest sales challenges?

CUSTOMER SUCCESS/RETENTION

Do you have a CX (Customer Success) Vision and Strategy in Place?

Do you have a customer segmentation process? Are certain customers prioritized?

Do you have an established Customer Success Operating Plan?

Do you have a robust customer onboarding process?

Do you measure customer retention and perform churn analysis?

What tactics and or tools are in place to monitor retention and customer feedback and or platform usage?

Do you have a strong CX team in place, and do they understand all the data, triggers, and processes needed to maintain customers?

When there's indications of churn potential, do you have a comprehensive plan in place to address those customers of concern?