

## JointSourcing Blueprint Questionnaire

### **Company**

- 1) What are your goals for the company and what are the challenges you face in meeting your goals?
  - A. Goals
    -
  - B. Challenges:
    -
  
- 2) What markets/segments do you operate in?
  - 1.
  - 2.
  - 3.
  
- 3) Some basics:
  - A. When was the company founded?
    -
  - B. How many employees do you have?
    -
  - C. What do you estimate your revenue will be in the next 12 months and what is the estimate based on?
    -
  
- 4) What would you like your customers to say about your business? What do they actually say?
  - A. Like to say
    -
  - B. Actually say
    -
  
- 5) Do you have a tagline? What does it mean to you? What do you think it means to your customers?
  - A. Tagline
    -
  - B. Meaning to you
    -
  - C. Meaning to customers
    -
  
- 6) What do you think your company's value proposition is? What do you think your customer's think it is?
  - A. Value prop to you
    -
  - B. Value prop to your customers
    -
  
- 7) What are the names and 1-2 sentence descriptions of your 5 most important product or service lines?
  - 1.
  - 2.
  - 3.

- 4.
- 5.

8) In order of their importance to you, what are their average selling price and gross margins?

Name:	ASP	Gross Margin
1.		
2.		
3.		
4.		
5.		

9) What should Sales Renewal focus on? How will we know if we've succeeded?

- Focus
  -
- Success criteria:
  -

## **Customers**

### **Current:**

10) What are your customer's pain points? What triggers their need for you?

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11) How would you characterize your current customers? What are they really buying from you?

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12) What kinds of things do you do to retain customers, increase their loyalty and sell more to them?

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13) What is the lifetime value of a customer?

Calculator: <http://hbsp.harvard.edu/multimedia/flashtools/cltv>

Explanation: <http://blog.kissmetrics.com/how-to-calculate-lifetime-value/?wide=1>

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14) Who are your top 3 referrers (people or organizations that refer business to you)? How did you get them?

- 1.
- 2.
- 3.

15) How do you market to prospects, customers and referrers? What has worked and what hasn't? Do your prospects find you or do you find them?

A. New customers:

- 

B. Existing customers:

- 

C. Referrers:

-

16) What is your current sales process (i.e., what are the steps in turning a lead into a sale)?

- A. Lead
  - What percent of your leads come via phone, web form submits, email or other?
- B. Step 1
  -
- C. Step 2
  -
- D. Step 3
  -
- E. Close
  - What is your close rate? What could improve it? How do you compare with your industry?

17) How do the characteristic of your *existing* prospects and customers vary through the different stages of the Sales Funnel?

	Visitor 1	Visitor 2	Visitor 3	Customer
	I have a need; how can I address it?	Which company's solutions look good to me?	Which specific offerings are best for me?	Why should I continue to buy?
3 - 4 demographic, geographic and/or behavioral traits e.g.: <ul style="list-style-type: none"> <li>• 45-55 year old executives in Dallas Tx. worried about security</li> <li>• Recent college grads of both sexes establishing a first apartment in big US cities</li> </ul>				

**New:**

18) Are any of the above traits different for the *new* prospects you want to attract? How so?

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**Competition**

19) How generally competitive is your industry?

1. \_\_\_ Not all competitive
2. \_\_\_ Somewhat competitive
3. \_\_\_ Typically competitive

4. \_\_\_ Highly competitive

20) How competitive is your firm within your industry?

Are your products/services viewed as a commodity, no different than a competitors?

Are your competitive advantages protected by law (i.e., by a patent)?

Or do your competitive advantages fall somewhere in between?

1. \_\_\_ Commodity

2. \_\_\_ Few advantages

3. \_\_\_ Average advantage

4. \_\_\_ Lots of advantage

5. \_\_\_ Patented

21) Who are you 3 - 5 biggest competitors (name and web address please)?

1.

2.

3.

4.

5.

22) What are your 3 strongest competitive differentiators? Are they sustainable?

1.

2.

3.

23) In a competitive sales situation, what negative things might they say about your company?

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24) Are you going after the same customers as they do? How do they attract prospects?

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## ***Budget***

25) Let us review the data you added to the "Current & Future Budget" tab in the JointSourcing Blueprint Questionnaire you completed prior to this meeting. Notes:

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26) Which promotions have you run in the past that were successful, which were unsuccessful and why?

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27) By cost and/or by close rate, what are your top 3 ways of attracting prospects?

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28) Do you know the cost per lead and cost per sale for your sales & marketing activities?

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## ***Sales Channels***

### **Customer Touch Points (Channels)**

29) What do you like and not like about your current site? Are there specific things you want to change?

A. Likes/continue/expand

- 
- 
- 
- B. Dislikes/want to change
- 
- 
- 

30) Do you have additional web sites? Which should Sales Renewal focus on?

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31) Is your current site "responsive" (i.e., it automatically adjusts to different screen display widths)?

- Yes or No

32) How important is Search Engine Optimization to you and how successful have you been at it?

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33) Looking at the list of keywords you supplied in the Blueprint Questionnaire you completed prior to this meeting, which are the most important and which are the most effective at bringing you qualified traffic?

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34) How time-based are your sites? Do they change daily, weekly, monthly, seasonally? Who does this and is it done in a timely manner?

A. How time based is it?

- 

B. Who updates it in a timely manner?

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35) Is there a potential for selling directly off your website (e.g., e-Commerce)

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36) Can your site offer value even when they're not buying? Can you offer reasons for prospects to visit your site? E.g.: education, industry knowledge, unique perspective

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37) Is information that comforts the visitor displayed on your site? E.g.: trust certificates, industry credentials, customer testimonials, press coverage, publications & awards.

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38) Can your web address be confused with another (similar name, common typos, look and feel)?

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39) Do you use a centralized computer system that holds most/all of your business info (e.g., Point-of-Sale, QuickBooks, CRM, etc.)? Does the Website need to integrate with it?

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40) Do you have a blog?

- Yes or No
- If yes, who is the blog targeted to (i.e., its audience)?
  -
- What's worked & what hasn't?

- 
- How often do you blog and who does it?
- 
- What else should we know?
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41) Are you looking for expert assistance (i.e., Coaching) with blogging, and content generation in general (whitepapers, Product literature, infographics, etc), or would you rather we do it for you under your supervision (i.e., ghostwrite it)?

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42) How important is Paid Marketing (Advertising, Direct Mail and Telemarketing) to you and how successful have you been at it?

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43) Please describe how, and how frequently, you utilize your social media pages :

- 
- 

44) Have you ever sent promotional emails designed to generate immediate sales

- Yes or No
- If yes, who's the audience, what's worked & what hasn't?
- 

45) Do you send out an informational newsletter: one designed to pull people through the Sales Funnel via education? If so, who's the audience, what's worked & what hasn't?

- Yes or No
- If yes, who's the audience, what's worked & what hasn't? And how often does it go out and who writes and produces it?
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46) Do you do specifically do anything to generate additional sales from existing customers? For example, do you have a loyalty system in place?

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47) Do you benchmark your marketing activities? If you do, what data do you track and what tools do you use to do so? How important is this to you going forward?

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## **Administrative**

48) Who will be the "official contact person" (i.e., the person who will serve as the final decision maker and will be available for consultation with Sales Renewal, as needed, during normal business hours)?

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