**Strategy and Design Questionnaire -**

Date:

Contact Name:

Company Name:

Company Address:

Phone Number:

Current Email Address:

Year Established:

Why are you undertaking this project? (check all that apply)

\_\_\_ Refresh the website look \_\_\_ Create Professional Presence \_\_\_ Mobile/Responsive

\_\_\_ Generate more traffic \_\_\_ Generate more leads \_\_\_ Make it easier to find us online

\_\_\_ Differentiate us from our competitors \_\_\_ Other (please specify)

\_\_\_ Add new features like and online store or membership site (please specify)

**Business Background**

Describe Your Business

Current Number of Leads / Mo: Conversion % of Leads: Ave Job Value:

Business Mix Ratio? (list % - PLEASE break out ALL relevant services)

\_\_\_ % Service 1 \_\_\_ % Service 2 \_\_\_ % Service 3 \_\_/\_\_/\_\_ % Ideal Mix Ratio

Please list the estimated ratio of business that comes from each of your core services

Please describe your most profitable services

Please describe the best foot in the door services that typically lead to adding more services over the lifetime of the client

Who are your top referral sources? (Example below for home services – replace as appropriate)

\_\_\_ % Home Owners \_\_\_ % Commercial Developers \_\_\_ % Architects

\_\_\_ % Builders \_\_\_ % Other Trades \_\_\_ Competitors

Background/Bio: A little bit about yourself and why you are in business

What's your vision and purpose for the future of your business?

What are your dominant revenue streams?

In three sentences or less, can you clearly describe what you do or what you offer your clients?

What is your core message, positioning?

Is the message your company is telling clear and compelling?

Who is your ideal customer/s? (Geographic, demographic, psychographic). Describe your ideal client in as much detail as possible (If you serve multiple segments, please describe each, which each product/service)

Do you have a tagline?

What is your elevator pitch? Is it clear, engaging, and easy to understand?

Do you have a mission statement?

Local Requirements:

* Do you have multiple locations?
* Where are they located?
* Do you offer different products or services per location?

**Marketing Overview**

How much of an investment in marketing do you think it will take over the next 12 months to take your business to the next level? (total includes online, advertising, PR, consulting, direct mail, etc)

* Under $5,000
* Under $10,000 (If you are a very small service business, this may be bare minimum)
* Under $20,000 (If you are a small service business, this may be an effective amount. If you are a product/retail business, this is bare minimum)
* Between $21,000- $49,000 (You know marketing is important but this is almost bare minimum)
* Between $50,000 - $75,000 (This gives us an idea on how important marketing is to you)
* Over $75,000 (We will prepare a custom response based on your significant interest)

Select (bold or underline) all that apply - We use the following in our educational marketing and promotion . . .

|  |  |  |  |
| --- | --- | --- | --- |
| Blog | eBooks | White paper | Workshops |
| Seminars | Marketing kit | Articles | Testimonials |
| Case studies | Partner content | Media kit | Video |
| Podcast | Newsletter (email/print) | Email drip | Customer content |

Select (bold or underline) all that apply - We use the following to help build trust . . .

|  |  |  |  |
| --- | --- | --- | --- |
| Free workshops | Prospect assessment tool | Free "how to" content | Free trial offers |
| Low cost trial offers | Special offers to switch | Customer training | Customer orientation |
| Membership offerings | Subscription offerings | Frequent buyer offerings | Results review sessions |
| Monthly follow-up | Customer only events | Customer feedback tools | Help desk and support |

Select (bold or underline) all that apply - Our web presence includes . . .

|  |  |  |  |
| --- | --- | --- | --- |
| Website | Blog | email newsletter | email autoresponder |
| email lead capture form | Landing pages | Analytics package | Competitive monitoring |
| Reputation management | Business Directories | Google or Bing Ads | Webmaster tools |

Social Media Profiles (provide url/handles below)

|  |  |  |  |
| --- | --- | --- | --- |
| Facebook Page | Twitter profile | LinkedIn profile | LinkedIn Company Page |
| YouTube Channel | Pinterest Business Page | Instagram | Snapchat |
| Google My Business | Yelp profile | Facebook Ad Account | Other |

Select (bold or underline) all of the tactics you currently use to generate leads.

|  |  |  |  |
| --- | --- | --- | --- |
| Outdoor advertising | Directory advertising | Direct mail | Social media |
| Radio/TV | Direct sales | SEO/SEM | Pay per click ads |
| Word of mouth | Print advertising | Online advertising | PR efforts |
| Referral generation | Email promotion | Coupons | Flyers |

**Add appropriate notes as relevant like - NOTE: There are restrictions on advertising for Civil Engineers**

Describe your lead conversion (sales) process

Select (bold or underline) all that apply - We track . . .

|  |  |  |  |
| --- | --- | --- | --- |
| Annual revenue | Marketing cost/customer | Number of leads | % of leads converted |
| Average trans/cust | # of annual trans/cust | # or referrals | % of cust referrals |
| PR mentions | Social media mentions | Customer satisfaction | Profit per customer |
| Testimonials | Customer results | Other - | Other - |

Do you have and use a marketing plan?

\_\_\_ Yes \_\_\_ No \_\_\_Kind of

Do you have and use a marketing calendar?

\_\_\_ Yes \_\_\_ No \_\_\_Kind of

Describe your greatest marketing challenge right now

When it comes to obtaining qualified leads, what are your biggest challenges?

When it comes to closing leads, what are your biggest challenges?

Do you offer a lead-generating PDF or downloadable asset that captures email addresses?

Do you have an automated email campaign that onramps your customers to your product or service?

Have you written a sales letter that is converting prospects into customers?

Have you collected and displayed stories of transformation you’ve allowed your customers to experience?

Any Awards or Certifications (e.g., Angie’s List Service Award, BBB Rating)? Any Memberships or Organizations you affiliate with (Painting Contractor Association, local chambers)?

Any Specific Products or Brands that you use?

**Competitive Overview**

What makes you different from your competitors? Why do people buy from you over competitors?

List 3 competitor’s names, website, and a little background on them.

1. Competitor 1:
2. Competitor 2:
3. Competitor 3:

What about these companies makes then stand apart from others?

**Website Overview**

Does your website include the following items?

* Clear and concise statement of what you offer
* Images that communicate what success looks like for your customer
* Specific value you deliver to your customer as a result of using your product/service Direct call to action that is the obvious button to press
* A plan that shows your customers how to do business with you
* A transitional call to action or lead-generating PDF
* Bite-size breakdowns of your products or services

What are your top goals for your website and business? (Select all that apply, and place a number beside the goals you select to indicate priority order)

\_\_\_\_\_ Search Engine Optimization

\_\_\_\_\_ Education

\_\_\_\_\_ Lead Generation

\_\_\_\_\_ Landing Pages

\_\_\_\_\_ Contact & Directions

\_\_\_\_\_ Membership

\_\_\_\_\_ Sell Products

\_\_\_\_\_ Other

If other, please explain.

Any other goals or needs for the site we need to accomplish?

Is SEO a part of your budget?

\_\_\_\_\_ Yes \_\_\_\_\_ No If Yes, Please provide your top 5 keywords:

1. Keyword 1:
2. Keyword 2:
3. Keyword 3:
4. Keyword 4:
5. Keyword 5:

(Please list in priority order. Use 2-3 word phrases)

What is the overall content strategy?

What pages & content do we need and how should it be structured?

Briefly define your product or service offerings

What are the top 3 Calls to Action (CTA's), in priority order? (Examples: Schedule a free estimate, Download our ebook, Request a service call)

1.

2.

3.

What does your current website do well?

What does your current website do poorly?

What do you **not like** about your current website?

What are the desired elements/modules for the website home page?

\_\_\_\_\_ Hero image (A hero image is a large banner image, prominently placed on a web page, generally in the front and center. The hero image is often the first visual a visitor encounters on the site and its purpose is to present an overview of the site's most important content – Source: [Wikipedia](https://en.wikipedia.org/wiki/Hero_image)®. We recommend an image of a happy client using your product if possible)

\_\_\_\_\_ Testimonials & Endorsements

\_\_\_\_\_ About / Intro / Our Story / Owners/Founders (select all that apply)

\_\_\_\_\_ Credibility badges (Examples: Angie’s List, Certifications, Awards, Memberships)

\_\_\_\_\_ Featured Content (pulling in image and intro text for an important page or post)

\_\_\_\_\_ Services

\_\_\_\_\_ Focus area like a special offer or other Call To Action?

\_\_\_\_\_ Online Store

\_\_\_\_\_ Blog feed

\_\_\_\_\_ Custom function? (If yes, please elaborate)

\_\_\_\_\_ Anything else? (If yes, please elaborate)

Further description or custom needs for the home page layout

**If Local Search is important**, please list your top geographic areas you wish to rank for (in priority order, and be specific. Can include neighborhoods, or other towns and cities) --- **Add at least 10**

|  |  |
| --- | --- |
| 1. Local Area 1: | 6. Local Area 6: |
| 1. Local Area 2: | 7. Local Area 7: |
| 1. Local Area 3: | 8. Local Area 8: |
| 1. Local Area 4: | 9. Local Area 9: |
| 1. Local Area 5: | 10. Local Area 10: |

What are the key elements for other pages/sections, sidebars, graphics, etc.?

What colors and look and feel do you like or dislike? (If you have a logo please attach it or state that you need a new logo designed)

List any example sites you like and why

What's most important to you? (Select one)

\_\_\_\_\_ Stay on budget

\_\_\_\_\_ Lead generation & results

\_\_\_\_\_ Strategic design

\_\_\_\_\_ Other – Please explain:

List all of the ways customers find you today

Do you have any potential golden geese referral sources – we should include content on the website for them as well.

What problems do you solve for your customers? Try to address each customer segment that you have, or want to develop. Be clear.

What is the lifetime value of a typical ideal client? What is the typical transaction amount?

List your most profitable products or services (you can also list any that you would like to promote or create)

Is there a critical deadline for the new website to go live? If so, when?

Describe any current referral programs

Any Charities or Community involvement your Business donates to?

**Defining success**

At the end of a project or sale or even website visit, **how do you** qualify it as a success?

At the end of a project or sale or even website visit, **how does your client** qualify success?

What **does** your customer’s life look like **before** they hire your company?

What will your customer’s life look like **after** they hire your company?

How will you define the success of our program?

**Blue Ocean Strategy Considerations**

Blue Ocean Strategy can be summarized in a nutshell: the best way to beat the competition is to make the competition irrelevant.

To discover an elusive blue ocean, consider the Four Actions Framework to reconstruct buyer value elements in crafting a new innovation wave. The framework poses four key questions:

**Raise: What factors should be raised well above the industry's standard?**

**Reduce: What factors were a result of competing against other industries and can be**

**reduced?**

**Eliminate: Which factors that the industry has long competed on should be**

**eliminated?**

**Create: Which factors should be created that the industry has never offered?**