

# NEEDS ASSESSMENT

## SALES REP INFO

Name: \_\_\_\_\_ Date: \_\_\_\_\_

## TELL US ABOUT YOURSELF/YOUR BUSINESS

Account Name: \_\_\_\_\_ Social Media: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Business Category: \_\_\_\_\_

Email: \_\_\_\_\_ Key Products/Services: \_\_\_\_\_

Web Address: \_\_\_\_\_

What are your top business priorities... where are you doing well, where do you need to grow?

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What's your company's edge over competitors (niche)?

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What is the value/worth of a customer for you?

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What geographical area do you wish to target?

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What time of the day – or day of the week – do you feel it is best to reach your customer?

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## WHAT ARE YOUR MARKETING OBJECTIVES?

- Drive website traffic
- Drive ecommerce sales
- Drive price & product
- Build brand awareness
- Build email database
- Generate sales leads
- Drive foot traffic
- Grow local market share
- Grow regional market share
- Build reputation
- Other: \_\_\_\_\_

## WHO IS YOUR IDEAL CUSTOMER?

- Male
- Female
- Children at home
- Home owners
- Renters
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- <\$25,000
- \$25K-\$34,999
- \$35K-\$49,999
- \$50K-\$74,999
- \$75K-\$99,999
- \$100K+
- Geographic Area \_\_\_\_\_
- Occupation \_\_\_\_\_
- Lifestyle/Interests \_\_\_\_\_

## DURING THE PAST YEAR, HAVE YOU ADVERTISED IN ANY OF THE FOLLOWING MEDIA? WAS IT EFFECTIVE?

- Newspapers \_\_\_\_\_
- TV/Cable \_\_\_\_\_
- Radio/Broadcast \_\_\_\_\_
- Yellow Pages \_\_\_\_\_
- Magazines \_\_\_\_\_
- Billboards \_\_\_\_\_
- Direct Mail \_\_\_\_\_
- Internet/Interactive \_\_\_\_\_

## DURING THE PAST YEAR, WHAT INTERACTIVE PRODUCTS HAVE YOU USED TO REACH YOUR MARKETING OBJECTIVES? WHAT VENDORS/WEBSITES DID YOU UTILIZE?

- Banner Ads \_\_\_\_\_
- Video \_\_\_\_\_
- Contests (online) \_\_\_\_\_
- Directories (online) \_\_\_\_\_
- Coupons \_\_\_\_\_
- SEO \_\_\_\_\_
- SEM \_\_\_\_\_
- Email Marketing \_\_\_\_\_
- Mobile Marketing \_\_\_\_\_
- Ecommerce \_\_\_\_\_
- Social Media \_\_\_\_\_
- Daily Deals/Groupon \_\_\_\_\_
- Reputation Services \_\_\_\_\_

**WHAT WAS THE GOAL OF THE CAMPAIGNS, AND WHAT ACTION DID YOU WANT THEM TO TAKE WHEN THEY SAW, CLICKED OR READ YOUR AD? WERE YOU PROVIDED ANALYTICS? WOULD YOU BE WILLING TO SHARE?**

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**HOW DO YOU PLAN TO GAUGE/TRACK THE EFFECTIVENESS OF AN ADVERTISING CAMPAIGN?**

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**WHAT OTHER INFORMATION ABOUT YOUR BUSINESS, YOUR GOALS, OR YOUR OBJECTIVES CAN YOU SHARE TO HELP ME CREATE AN EFFECTIVE MARKETING STRATEGY?**

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**WOULD YOU BE WILLING TO SHARE:**

Annual Sales: \_\_\_\_\_ Annual advertising budget: \_\_\_\_\_ % of market share \_\_\_\_\_

Current advertising spending: \_\_\_\_\_ % of advertising of total sales: \_\_\_\_\_

**HOW A BUSINESS SHOULD CALCULATE THEIR MARKETING BUDGET**

Recommendation: Spend between 2-5% of sales. Some companies spend upwards of 8-15% when warranted – especially young companies that need to invest to build their brand.

- For example: Target spends 2% of its sales on advertising, while Best Buy spends upwards of 3%. Finally, more upscale stores like Macy's typically spend on the order of 5%.
- Automakers generally spend between 2.5% to 3.5% of revenue on marketing, liquor (5.5% to 7.5%), packaged goods (4% to 10%), and every other industry.

Businesses should allocate a minimum of 3-5% of total sales to advertising and marketing. However, allocation will depend on several factors: the industry you're in, the size of your business, and its growth stage. For example, during the early brand building years retail businesses spend much more than other businesses on marketing – up to 20% of sales.

As a general rule, small businesses with revenues less than \$5 million should allocate 7-8% of their revenues to marketing.