

Project Kick-Off Questionnaire

I. Business Strategy:

Please provide current business, marketing and marketing communications plan.

II. Revenue Goals:

- What are your overall goals for next year? Please provide by Qtr over Qtr growth.
- What are your business revenue expectations, based on your proposed budget investment?

III. Budget:

- What is projected promotions budget, including all anticipated agency fees, production costs (e.g., printing, postage, film, etc.).
- How was this budget determined?
- What was the promotional expenditure for last year (approximately) for each of the possible lead generation tools (e.g., advertising, direct mail, events, PR, etc.)

IV. Objectives:

- Please rank in order of importance specific marketing objectives for the next year? (i.e. increase brand awareness, improve brand perception, lead generation)
- Please address overall quantitative and qualitative objectives as well as individual product/market goals.

V. Communications Messaging:

- Please describe in one sentence the latest thinking of your overarching, most-effective and defensible position statement? *And please note if all decision makers have agreed on this.*
- How would you want your end-user to best categorize what kind of business you are?
- What is the single most important benefit your solution provides/provides?

VI. Marcom Metrics:

- Please provide detailed ROI research that outlines how past marketing communications have achieved KPIs. (Please provide from a \$ cost conversion by tactic, and by integrated model)
- Any research that tracks the current brand perception, awareness (aided and unaided), etc.

VII. Competitive Positioning:

- Who are the competitors? (Rank in order of importance)
- How is each major competitor positioning itself in the market?
- How effective do you feel each competitor's positioning is? Why?
- How effective do you feel each competitor's offerings are? Why?
- What is your strategic, competitive position? Is it different, unique, and defensible versus the competition?
- Has this position changed recently? If so, how and why?
- Is this position getting stronger or weaker? If so, why?
- Are there any internal or external factors that might or should change the competitive position? Please describe.

VIII. Product Offerings/Competition:

- What are we really selling?
- What are the major features and benefits of such? (Please answer from a customer view and in relation to your competition).
- Which features and benefits appeal to which markets?
- What are the capabilities of the competition from least capable to most capable?
- In what way(s) is the offering more effective?
- In what way(s) is brand x more innovative?

IX. Sales:

- What is cost of customer acquisition broken out by sales efforts, marketing efforts, etc.? Is there a variance between current customers versus non-existing customer?
- What is the average sales cycle? Existing customers, new prospects?
- How many direct sales force employees do you currently have employed? Is there any growth or contraction trends forecasted? How is the sales force structured (i.e. region, by account, by product)
- What is lifetime value of an account?
- What is the expected overall revenue increase from the current base.
 - current customer
 - new customer
 - direct versus channel
- What is the average deal size. How is that split between software licensing and services?
- Do you have any web reports that highlight the number of hits and from what referrals or domains locations over the course of the past 12 months. Please overlay that with any outbound activities that may have affected the volume variance.
- Do you happen to know what is the ratio % of an appointment of a or b leads to close ratio is?

X. Marketing Tactics

- What does brand x feel its most effective promotional activities have been in the past?
- Least effective?
- Why?

A. Direct Marketing

- What is the cost per lead (by current customer purchasing more, by new prospect)? What factors are considered by cost per lead? (i.e. 1:1 sales calls, telemarketing, online effort, etc.)
- How are those tactical instruments of outbound communication currently integrated in effort?
- Typically over the course of a year, how many times are your current prospects contacted and the marketing cost for such contact, and by what means?
- Please provide a report that indicates the source of inquiry (i.e. cold call, email promotion, offline DM, seminars, telemarketing, etc.) If there was an integrated model that may use more than one instrument noted before, please deliver the number of prospect contacts needed to help close the deal (i.e. 8X telemarketing, 3X email, 1 DM to one named prospect before it is categorized as a lead).

Please describe the lead qualification criteria/profile for an A/B leads.

- Do you currently track how many Bs turn into As?
- Also, what is the average length of sales cycle of an A or B lead to close?

What is the single most important offer that converts the prospect into a customer?

B. Database Questions

- Please describe the process and structure of managing your current corporate and field database— everything from CRM models. What technology are you currently using? How do you organize, grow, collect, groom the data? How are reports viewed? What metrics are in place to scrub it?
- How is currently segmented? And what plans are currently in place to continuously update contacts – is it through list acquisition (if so how, where, why). How are those new names being populated throughout the enterprise?
- Please describe your current database marketing process (Not direct marketing)?
- How much money is currently being invested in online marketing? And what has been CPC, CTR, and from those efforts?
- Please break down by number of total contacts. We need this, like the other information, to properly propose how much effort it will take to manage a single data warehouse of all of your customers, prospects and sourced lists.

C. Advertising

- A copy of your current advertising creative brief.
- A copy of your committed ad rates per publication for next year's media schedule.
- Copy of competitive ad spending analysis and placement.
- Any past historical lead analysis from advertisements

D. Search Engine

- Please describe your online search optimization plan. What, where, how including paid for click, key word search, outlets, etc.

E. Tradeshows

- What do you consider your MUST shows for target?
- How do you currently make customers and prospects aware of your attendance?
- What do you expect in terms of A-level leads, appointments expected revenue for this effort? In fact, please breakdown total number of inquiries to close ratio.
- What merchandizing have you negotiated with such commitments?
- Are you a lead sponsor for any of these?
- Are planning on any major press announcements or analyst tours during these events? Please explain.

F. Public Relations

- What new services, events, etc. will you introduce over the next 3 – 6 months? Year?
- What's in the pipeline?
 - Editorial Calendar
 - Sponsorships/Donations
 - Partnerships
 - Personnel Announcements
 - Issues and advocates
 - Events
 - Conferences
 - Webinars
 - Milestones
 - Speaking engagements

G. Other