



Marketing Assessment Worksheet

1. What are your goals & objectives for your company over the next year? Next five years?

2. Please list your company's target markets in order of priority (please include detail -- type of industries, company size, etc.).

3. In your experience, what are your company's barriers to communication and effective marketing?

4. What are your company's strengths? Weaknesses?

5. What are your company's competitive advantages? Disadvantages?

6. Who is your company's competition (any potential competitors)?

7. Please indicate any significant opportunities and threats that exist for your company.

8. What are the benefits of working with your company from the customer's perspective.

Please note: "Features" are what come built-in to the service or product. A "Benefit" is what the buyer gains from the feature (outcomes).

9. Do you have a role model within the industry? If so, why are they your role model?

10. Please list your company's current menu of products & services.

11. Indicate any products & services you plan to add in the future.



12. Describe your company in one word.

13. Describe your services in one word.

14. What is your company's price image?

15. Does your company have a quality control program in place? Describe?

16. How would you describe your....

Sales approach: _____

Delivery: _____

Installations: _____

Response time to sudden changes: _____

Products & services: _____

Are any of the above unique or different in any way? _____

17. Please indicate your customers' demographics (age, income, education level, etc.):

18. What are your customers' attitudes about your industry?

19. What is the customer's level of awareness of your industry and its activity (how much do they know/how much do they really want to know)?

20. Customer Buying Patterns:

21. Name ten customers who are current clients and what services/products they purchased from you.

22. Name ten prospective customers whom you are trying to sell to.



23. Describe your typical client in one word.

24. Describe your current marketing in one word.

25. How do you handle inquiries?

26. If you could go back in time what would you do differently? Why?

27. What specifically do you want your marketing communications program to accomplish?

28. If you could communicate only one word to the prospective client to tell your whole story, what would it be? Why?

29. What is your company's image? As you see it? As your clients see it? If you want to change it --to what? Why?

30. What is your business philosophy?

31. What do you want out of life?

32. What is your favorite color?

33. What is your favorite book?

34. What is your favorite type of food?

35. Are there some things I should have asked about but didn't?

