



Discovery Process



Complete the following questions to the best of your best ability.

Company Name

Date

Discovery

1. What would you like to achieve by working with us?

2. Describe your business and revenue streams

3. List three competitors and their strengths plus their URLs

4. Describe your marketing team and how it fits into the overall organization



Discovery Process

Marketing

5. What are your greatest business challenges and opportunities?

6. What are your greatest marketing challenges?

7. What are your 2-3 highest marketing priorities?

8. Why do people buy from you v. competitors?

9. What's the single greatest factor in the success of your business?



Discovery Process

Ideal Client

10. Define ideal customer.

11. List the ways you come into contact with prospects and customers

12. What is one word customers use to describe your brand?

Core Message

13. What is your core marketing message?



Discovery Process

Hourglass

14. Most effective lead generation activities?

15. Sales process?

16. Web site conversion success?

17. Do you employ any offline tactics?



Discovery Process

Repeat/Refer

18. How do you stimulate referrals?

19. Most valuable customer service tactic?

20. What are your 5 most important marketing metrics?