



THE ULTIMATE CLIENT NEEDS ANALYSIS



Company: _____

Date: _____

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THE ULTIMATE CLIENT NEEDS ANALYSIS

BASIC QUESTIONS:

1. What are the biggest challenges you are facing in marketing your business?
2. Where do you need to see quick improvements in your marketing?
3. What is your overall need right now? (e.g., having more time, getting more business, needing more ideas, etc.).
4. What are some of your goals for your company/department?
5. When does your fiscal year start? How often do you buy promotional products?
6. Do you have a current yearly marketing/advertising and promotions budget? If so, what is it?
7. How much have you spent in the past for promotional products? Per item? Per program?
8. Tell me about the decision-making process for promotional products/branded items in your business?
9. Who has the buying authority?
10. Do you have multiple locations? If so, where? National? International?
11. If you have multiple locations, is one doing measurably better than the other? If so, why?
12. What is the primary advantage that makes you different from your competition?
13. Who is your competition? Local? National? Online?
14. What positions/people do you/your sales team target?
15. Do you/representatives of your company attend tradeshow?
16. If so, which ones and how often? What kind of results do you typically get?
17. Are you currently tracking the results of your marketing promotional material?
18. If so, then what is your ROI?

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19. What are you doing/have you done recently to promote your business? (e.g., Billboards, TV, Radio, Ads, Social Media, etc.).
20. Are you currently satisfied with your marketing efforts?
21. What is your most effective form of advertising media?
22. How do you measure the effectiveness/ROI of your marketing methods?
23. How are you currently out-marketing your competition? Or, how is your competition currently out-marketing you?
24. How are you currently identifying new leads?
25. Do you have a CRM? If so, do you use it on a regular basis?
26. If you want to immediately increase customer or public awareness about your product or service, what would be the best way?
27. Do you target business to business, business to consumer, or both?
28. What are current trends or specific trends, if any, in your industry?
29. How do you respond to your competition's marketing?
30. Would you describe your marketing as more or less aggressive as your competition?
31. What is/has been the most challenging or difficult aspect when it comes to using promotional products?
32. In regards to question 31, if you could have immediate help, what would it be?
33. Do you understand the difference in a simple giveaway versus an actual promotion plan?
34. If I recommended a promotional plan that generated a substantial response and ROI, would you have the office staff to handle the increase in business?
35. What specific actions do you want your leads to take? Where do you want them positioned? Remember, different promotional campaigns create different results.
36. Do you currently maintain a database of leads and prospects? If not, do you have the staff and the ability to begin to do so?

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37. If I set up a lead generation promotion campaign, will it be effectively administered and followed through?

YES OR NO QUESTIONS:

38. Do you need help getting new clients?

39. Do you need help keeping existing clients?

40. Do you need help resurrecting old leads?

41. Do you need help keeping employees?

42. Do you need to improve safety in the workplace?

43. Do you need to promote a website?

44. Do you need to promote a service?

45. Do your services/products change often?

46. Do you need help recruiting new personnel?

47. Do you need to improve client relations?

48. Do you need help increasing the size of your average orders?

49. Do you need help increasing the price of your service?

50. Do you need help awarding exceptional service?

51. Do you need help encouraging repeat orders?

52. Do you need help creating incentive programs?

53. Do you need help energizing sales calls?

54. Do you need help acknowledging orders?

55. Do you need help acknowledging anniversaries?

56. Do you need help improving direct mail response?

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57. Do you need help improving print advertising results?
58. Do you need help motivating employees?
59. Do you need help raising funds/fundraisers?
60. Do you need help rebranding?
61. Do you need help promoting a re-opening?
62. Do you need help promoting a new branch opening?
63. Do you need help introducing new services or products?
64. If so, how often?
65. Do you need help driving traffic to a tradeshow booth?
66. Do you need help in coming up with new ideas/brainstorming?
67. Do you need to consolidate your marketing?
68. Do you need to diversify your marketing?
69. Are you basing your marketing strategies on stats?
70. Do you need help with converting prospects to customers?
71. Do you need help with follow-up strategies?

BASIC QUESTIONS:

72. Do you have current follow-up strategies in place?
73. If so, what are they?
74. How effective are your follow-up strategies?
75. How often do you typically follow-up before moving on?
76. Do you give thank you or seasonal gifts to your clients? If so, what type of gifts and how often?

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77. What specific events do you have coming up in the next 30-60-90 days?
78. Do you know the objective you're trying to accomplish when getting promotional products?
79. Do you have a steady stream of leads?
80. What is the average value per customer?
81. Are all customers the same value?
82. Do you give thank you gifts to those who refer you business? If so, how often?
83. What are your favorite promotional products?
84. Tell me one promotional product that was an instant hit.
85. Do you ever use branded apparel? If so, how do you use it?
86. What is the one item, if I bring it in here, you will throw me out and tell me to never come back?
87. If I provide a promotional plan that brings in increase revenue, what are the chances you will continue to buy promotional products from me?
88. If I provide a promotional plan that didn't bring in the increased revenue hoped for, what are the chances you will continue to buy promotional products from me?
89. Are there any services or products that you offer that you wish your customers were more aware of?
90. What current promotional product items are you using?
91. What are your expectations when you buy promotional products? What do you want to happen?
92. Do you keep a calendar of events and typically know well in advance when you will be ordering your promotional products?
93. What is the driving force in your decision making when it comes to choosing which promotional product company to use? (e.g., communication, service, price, locally owned, coaching, etc.).
94. Who are you currently using for your promotional items? Are they local?

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95. What do you like most about them?

96. What do you wish could be different?

97. What would you rank their service on a scale from 1-10?

98. Is there any service that you would find helpful that you're not currently getting or that isn't currently offered from your current vendor?

99. Are you open to new marketing ideas and thinking outside of the box?

100. If I were able to provide you with a unique, promotional plan that your current vendor has never suggested to you and one that addresses your primary issues and concerns, would you be willing to place just that part of the business with me?

101. What would hinder us from doing business together?

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