

pre-discovery questions



PICK AND CHOOSE FROM THESE QUESTIONS TO HELP DETERMINE A CLIENT'S FIT FOR PIXA.

give me an overview of your business and what your main focus is?

- **Products and services** – any new products in development?
- **Strengths and capabilities** – what are your unique selling propositions?
- **Philosophical advantages of this company** – why should your prospects care about you?
- **Any disadvantages, vulnerabilities, risks that impact this company?**

what are your goals and objectives for the next 12 months?

- Primary objectives
- Current strategy to meet goals
- What obstacles are you running into?
- What will happen if you don't meet your objectives?

how is the product or service sold?

online, what's the mix?

what are you trying to achieve with current marketing efforts?

- Lead Generation
- Client Retention
- Foot Traffic
- Donations

WHAT WILL TRIGGER YOUR PROSPECTS OR CUSTOMERS TO THINK ABOUT YOU?

describe your current marketing mix

- Direct mail, email, mass media, social media?
- How is it working for you? Successful or not?
- What is the messaging, offer, call to action?

what kind of results are you seeing?

- Response rates?
- How do you measure results?
- Did you analyze the ROI?
- How much will a new sale contribute to your revenue?
- What is the lifetime value of a new customer?
- Who follows up on the responses?
- How do you go about distributing the leads? How fast is this?

who is your target audience? describe your ideal customer

- Demographics and buying habits?
- Do you have good data? List sources?

crm

- Do you use one?
 YES NO
- What data are you capturing?
- What would you like to capture that you haven't yet?

integrated marketing

- How familiar are you with the concept of integrated marketing?
- Have you evaluated technology such as purls, landing pages, email, QR codes?

LET'S PICK A DATE FOR OUR NEXT MEETING.

after demo

- What is your next planned marketing event?
- What is the timeline?
- What does your budget look like?
- Any questions about material covered?
- Any concerns?
- Can we propose an integrated campaign?