



▶ 1. CONTACT INFORMATION

▶ 2. MARKETING/SALES INFORMATION

▶ 3. ADVERTISING AND PROMOTIONS

○ RETAILER | DEALER VERSION

Marketing *analysis*

USE THIS DOCUMENT TO ASSESS YOUR CLIENT'S MARKET AND HELP THEM IMPROVE SALES

1. CONTACT INFORMATION

Date of meeting: _____

Advertised Name of Company: _____

Legal Business Name: _____

Operating Address: _____

Telephone: _____ Fax: _____

Email: _____ Web: _____

Name and Title of Advertiser Decision Maker : _____

Names and Titles of Key Influencers: _____

Best Day(s)/Time(s) to meet/call: _____

This is a: Franchise _____ Chain _____ Independent _____ Public Co. _____ Partnership _____

Head Office Address: _____

Agency: _____ Contact: _____

How Long is Business: _____ Fiscal Year End: _____





2. MARKETING/SALES INFORMATION

NOTE: Advertising deals with customer perceptions. Please try to answer these questions NOT in terms of reality, but in terms of customer perceptions. We will discuss the reality and how to change perceptions where perceptions do not match reality.

Biggest Competitive Advantage: _____

Why?

Discussion:

Biggest Competitor: _____

Why?

Discussion:

Biggest Competitor's Weakness: _____

Why?

Discussion:

80% of Your Customers Currently Come From: _____

Why?

Where is your future? Estimating the values in this chart will help us build a more profitable advertising plan designed to give you an edge on your competitors.

Department/Line	Current % of Sales	% of Profit Contribution	Growth Potential	Why/How

Does your company or any of your staff have any unique achievements, awards or history of note?

Any planned new products or services? _____

What % of business is: New? _____ Repeat? _____

What are your competitors likely to say about your company/product/services?



3. ADVERTISING AND PROMOTIONS

What do you want people to think of **first** when they think of your business: _____

Why?

What do you want people to think of **first** when they think of your product line(s)?

Why?

What do you want people to think of **first** when they think of your services?

Why?

What is your corporate slogan? _____

What can we say about your business that your competitors can NOT say?

Why?

Discussion:

What method do you use to determine your advertising budget? _____

What sponsorships are you planning? _____

Why?

Discussion:

What shows or promotions are you planning? _____

Why?

Discussion:

What Industry or Business Associations do you belong to? _____

Do you have a manufacturer's co-op program? Yes _____ No _____

Co-op Contacts

Manufacturer	Product(s)	Contact	Phone

Describe the most successful sales promotion or advertising campaign you have ever run:

Why was it so successful?

ADVERTISING AND SALES PROMOTION BUDGET SUMMARY

Media	Current %	Future %	Strengths/Weaknesses
Sponsorships			
Shows			
Yellowpages			
Newspaper			
Magazine			
TV			
Radio			
Billboard			
Direct Mail			
Mass Mail			
Seminars			
Web			
Other			