



▶ 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?

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Any planned new products or services? \_\_\_\_\_

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What % of business is:    New? \_\_\_\_\_    Repeat? \_\_\_\_\_

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

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### 3. ADVERTISING AND PROMOTIONS

What do you want people to think of first when they think of your business: \_\_\_\_\_

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Why?

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

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Why?

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

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Why?

What is your corporate slogan? \_\_\_\_\_

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

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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-Transit			
Direct Mail			
Mass Mail			
Seminars			
Website			
Email			
Social			
Search			
Other			