

Sales Strategy Questions & Reasons

Client: Cell: _____

Date: Email: _____

Address:

Website: _____

Phone: _____

Date Biz Started: _____

Decision Maker(s) _____

REASON: All of the information collected above is critical. Do not leave anything out.

1. What are your marketing objectives and what is your marketing strategy for the next 12 months?

REASON: We must identify the objectives in order to determine if we can help and/or determine if they actually have established an objective(s) or if we need to help.

2. What is your unique value proposition that makes you different from your competitors?

REASON: Clients need to help identify why they know they are different so we can market with their UVP (Unique Value Proposition)

3. If I were to draw a circle on a map with your business as the center of the circle, that represented where the majority of your customers come from, would you say I should draw a 5-10-15 mile circle?

REASON: Most clients do not know where most of their business comes from. We must establish the area so we can make the case how effective and efficient we are in their “Circle of influence”

4. Who is your best potential customer?

REASON: Identifying the best potential customer is foundational to developing a plan to reach that specific audience.

5. What Product, Promotion or Price have you had success with, When-What-How & Why.

REASON: With this knowledge you should incorporate past successes into future plans.

6. What are your peak selling times of the year, those times where do you do the greatest percentage of your annual gross revenue? What are your busiest days?

REASON: This is mission critical information in developing a plan because the heaviest investment in advertising should correspond to the busiest times of the year. Knowing the busiest days will give the merchant the opportunity to promote great deals on the slow days

7. Do you work with an advertising budget and if so, what percentage of your gross annual sales does the budget represent? How much is your budget?

REASON: You must establish a level of client sophistication. If they have a budget you can get an idea of how aggressive your plan should be and if they share their percentage of sales you can help them understand the value of investing at the right level.

8. What advertising are you currently doing and what are the specifics? (How much, how long, etc.)

REASON: You need to know where they are spending their money and if it makes sense based on the facts. In other words, is the money allocated properly and are they investing or spending?

9. Who do you consider your top 3 competitors to be, & why?

REASON: You need this so you can better position your client against the competition and so you can monitor competitive marketing activity. Of course, the competitors may be clients as well and you never share confidential competitive information. Ideally the competitors are customers of yours.

10. How familiar are you with our products?

REASON: You must know what they know and how they feel about your products so you can either confirm or challenge.

11. What would be your expectations regarding this marketing commitment?

REASON: The entire exercise is about managing expectations so you might as well get expectations out in the open early in the process so you can help clients understand how realistic they are and how they plan fits the goals.

12. Can you think of any other question I should have asked you?

REASON: This is a disarming question and gives the prospect the opportunity to open up. They might reveal a hidden or soon-to-arise objection.

13. Do you have any questions for me, and what are your expectations of me?

REASON: Helps the prospect feel they have an open door. Stating what they expect of you helps you deliver realistic performance.

I will be prepared to present the creative ideas and plan 8-10 day from now, what would be a good time on the _____ or _____ to present? How does (specific time) work? Will everyone involved in the decision be participating in the meeting, so I can provide a sufficient number of proposals?

Proposal Presentation

Appointment: _____
