

New Client Questionnaire

Thanks for choosing The Write Ideas. If you are looking for ways to **get the most from your marketing** and **explode your business**, I can help! But in order to tailor my services to your needs, I need to know a little bit about you, your business and your goals.

Please take a few minutes to fill out and return this short questionnaire. If you are a new business, some of these questions may not apply to you. Feel free to skip them.

3 Ways to Return Your Questionnaire:

- **Mail To:** 10241 19th Ave SW
Seattle, WA 98146
- **Email To:** stacy@success-stream.com
- **Fax To:** (206) 768-2512

Business Name: _____

Your Name: _____ **Date:** _____

Your Position: _____

List the Names and Positions of Any Key People I Might Be Working With:

Names:	Positions:
_____	_____
_____	_____
_____	_____
_____	_____

Address:

Phone: _____ **Cell:** _____ **Fax:** _____

Email: _____ **Website:** _____

How do you prefer to be contacted? *Phone* *Email* *Fax* *Any*

What times or days are best? _____

New Client Questionnaire Cont.

What industry are you in? _____

Number of years in business: _____

Number and type(s) of employees:

Do you have a specialty? *No* *Yes (Please describe)* _____

Do you sell to: *Businesses* *Consumers* *Both*

Describe your target market(s):

Describe your ideal client or customer:

Who is your direct competition (provide Website addresses if possible)?

What makes your business/products/services different from your competition?

Is your business... *Growing* *Shrinking* *Stable* *New?*

What percentage of your business is *New Clients* _____% versus *Repeat Customers* _____%?

Do you currently do—or you planning for—any marketing or advertising campaigns?
 Yes *No*

If so, what and how often? _____

Which method(s) has been most successful? _____

Which method(s) has been least successful? _____

Where do most of your new clients come from (or where do you think they will come from)?

Referrals *Website* *Word of Mouth* *Print Ads*

Radio/TV Ads *Direct Mail* *Don't Know* *Other* _____

Who is currently in charge of your marketing? _____

What is their marketing background or education: *None* *College Degree*

Some College-level Classes *Workshops/Seminars* *Trial by Fire*

Books (List a few favorites)

Job / Other (please describe) _____

New Client Questionnaire Cont.

What is your current marketing budget:

\$_____per month or _____% of sales *Don't Know*

Do you currently have a marketing plan? Yes No

Do you have projected sales goals? Yes No

Are you on track to meet or beat those goals? Yes No Don't Know

What, if any, systems do you currently have in place—or planned—for ongoing client communication and follow up?

What, if any, systems do you currently have in place—or planned—for ongoing prospect communication and follow up?

Have any customers or prospects requested additional information that you did not have available? Yes No If so, what? _____

Do you have any testimonials from past or current customers?

If not, do you: Feel comfortable getting some Need assistance/guidance?

What do you believe is the single biggest roadblock to making the sale?

What are your three main objectives in hiring me?

1) _____

2) _____

3) _____

Which one is most important? #1 #2 #3

Do you have specific marketing or copywriting projects you would like to discuss? Yes No

If yes, please share the details... _____

What is your deadline for your project(s)? _____

Do you have a budget for your project? Yes, \$_____ No

Have you ever worked with a professional copywriter? Yes No

If not, who currently writes your marketing materials? _____

Have you ever worked with any kind of consultant? Yes No

If yes, what type? _____

What were the results? _____

Were you happy with the experience? Yes No

If not, why not? _____

What do you enjoy most—or are most looking forward to—about having/running a business?

What has been—or do you think will be—your biggest struggle(s) with starting/running your business?

What has been—or do you think will be—your biggest struggle(s) with marketing or growing your business?

If you could have one marketing or copywriting question answered, what would it be?

Whew! That's it. Though I do have one last request...

Please send copies of the following:

- **Sales and marketing materials for your products or services**
- **Rough drafts, outlines or sample documents** (critique, copy coaching or copywriting clients only)
- **Raw information** (copywriting clients only)
- **Product specs and information sheets where applicable** (copywriting clients only)
- **Competitor's marketing materials or Web addresses** (if available)

Thanks so much for taking the time to dig deep and answer these important questions. I look forward to helping you grow your business!