

LEAD ENGAGEMENT & SALES PROCESS

OBJECTIVES

- | | |
|---------------------------------------|------------------------------------|
| 1. Develop engagement strategy | 4. Design strategic sales process |
| 2. Generate high-value leads | 5. Deliver improved closing ratios |
| 3. Leverage & uncover existing assets | 6. Reduce over-work/running-ragged |

ANALYSIS | **YOUR SALES FUNNEL**

1. How do you log/document new leads? (CRM software, by hand, Excel?)

2. What is your current tactics / strategy for creating new leads?

3. KEEP WARM STRATEGY: How do you keep leads engaged/warm during the sales process – before they are landed?

4. SALES PROCESS: Outline your step-by-step sales process from in-take to closing

5. How long does this process take for your ideal, preferred projects / clients?

6. Do you have consistent lead generation over the past 3 years? Why or why not?

7. What is your current Sales closing rate? How is this different than the past 3 years?

8. What is the biggest reason a lead doesn't close?

9. What are you currently spending on Sales & Marketing?

10. What approximate percentage is this of your Gross Revenue?

11. How are you measuring your lead engagement success / R.O.I?

MARKETING | Brand Positioning

OBJECTIVES

- | | |
|---|------------------------------------|
| 1. Clarity: cut through clutter | 5. Cross-selling strategies |
| 2. Connect & resonate with ideal audience | 6. Define Unique Value Proposition |
| 3. Build trust & relationship | 7. Track & Measure results |
| 4. Make it easy for clients to buy | 8. Develop sales strategy & tools |

ANALYSIS | YOUR CLIENT

1. Do you keep a current electronic database of all customers? YES NO
2. Who are they? Describe their values, lifestyle, trends, consumables, vocation, business-role and personality-type.

3. What are they looking for?

4. How do they research and select someone like you?

5. What is it about your industry reputation they may be skeptical of?

6. What is the most common challenge(s) your client presents you in terms of your services, offering, value, etc?

7. What are their pains or concerns?

ANALYSIS | YOUR UNIQUE VALUE PROPOSITION

8. Who are you? What’s your “mojo”? What do you differently as a competitive advantage?

9. Why should this matter to your customer? How does this benefit them?

10. What are the key services you currently offer?

11. If you could communicate a **single message** about your business or offering, what would it be?

ANALYSIS | **YOUR COMPETITION**

12. List your top 3-5 competitors.

13. List their similarities to your business offering

14. List their strengths

15. List their weaknesses

SALES & MARKETING | Brand Positioning

QUESTIONNAIRE | YOUR BRAND

Fill in the check box where it applies to your business

<input type="checkbox"/>	We have a hard time communicating our value to customers in a compelling way
<input type="checkbox"/>	There's a disconnect with our sales' promise vs. what our customer experience is
<input type="checkbox"/>	We are all things to all people
<input type="checkbox"/>	We need help crafting a compelling story of who we are
<input type="checkbox"/>	If clients demand, we will lower our price "to get the job"
<input type="checkbox"/>	We don't have a strong marketing message or identity in the market
<input type="checkbox"/>	Our company's outward image (logo, photography, website, signage, etc.) is not in line with who we are or what we need to portray
<input type="checkbox"/>	We are all things to all people
<input type="checkbox"/>	We're not sure where we need to be heading
<input type="checkbox"/>	We have a hard time getting staff on board with things
<input type="checkbox"/>	Staff struggle communicating what we're all about
<input type="checkbox"/>	Repeat business is limited
<input type="checkbox"/>	Our customer is experience has much room for improvement
<input type="checkbox"/>	We struggle with being able to attract or retain great employees
<input type="checkbox"/>	Revenue is good, but profit is low