



Client Needs Analysis

Company:

1. How long have you been in this business?
2. How did you get started?
3. If relatively new, what did you do prior to this?
4. What's most enjoyable about being in this business?
5. What's least enjoyable about being in this business?

Business Advantages:

1. Why do customers come to you?
2. What do you offer that competitors can't or won't?
3. What makes your business unique (positioning)?
4. What is your single greatest competitive advantage?
5. What is your single greatest competitive disadvantage?

Competition:

1. Who are your biggest competitors?
2. Why do people shop there?
3. What are their primary competitive advantages?
4. What do they offer customers that you can't or won't?
5. Do you anticipate any competitive changes (new competition/old going out of business/new product lines, etc.)?

Products/Services:

1. Do you consider your products to be average quality? High-end? Low-end?
2. What are your best sellers? Worst sellers?
3. Anything you consider your specialty?
4. Anything you like to feature (maybe because of higher profit margin)?
5. This may seem like an odd question, but published research shows that a business of your type, with similar products and services, should have a gross profit margin of ____%. That's not net profit, but gross profit. Does that sound about right to you?

Customers:

1. Who are your current customers?
 - a. %Male? % Female?
 - b. Average age?
 - c. Average income?
 - d. Typical profession?
 - e. Typical level of education?
2. Who would you like them to be?
 - a. % Male? % Female?
 - b. Average age?
 - c. Average income?
 - d. Typical profession?
 - e. Typical level of education?
3. Do you anticipate any changes in your business that would affect your current customer profile?
4. From how far away do your customers typically come to shop? Are you satisfied with this?
5. What is the average amount a typical customers spends each time they shop your store?
6. Over the lifetime of your relationship with a new customer, how much might that customer spend?
7. How would a typical customer describe the experience of shopping at your store?
8. What is the single largest misconception non-customers have about shopping with you?

Objectives:

1. Is your business experiencing the kind of growth you need/want? If not, why?
2. What is your primary business image: low price, large inventory, uniqueness, customer service, etc.?
3. What would you want your overall image to be, if different from above?
4. Do you feel there are any misconceptions about you/your business that you would like to address?
5. How would you like to see your business change over the next 12 months?

Advertising:

1. What media (newspaper, billboard, radio, cable TV, direct mail, Internet) do you currently use?
2. Which do you use most often?
3. How often do you typically use this medium?
4. What do you like best about this medium?
5. What do you like least about this medium?
6. What percentage of your monthly advertising budget does each represent?

7. Do you utilize co-op? What are other possible sources of cooperative advertising funds? Are you currently taking advantage of discretionary vendor support?
8. Do you have any major sales events during the year? When?
9. What are your two strongest sales events, and why they are the most successful?
10. Are you selling products or services through your website?

Clubs/Community Organizations

1. Which clubs or community organizations do you and your business support (e.g. scouts, schools, library, museum, Rotary Club, Kiwanis Club, Little League Baseball, March of Dimes, United Way)?

Wrap-up:

1. Are there any other areas we should discuss?
2. Are any other individuals involved in making marketing and advertising decisions?
3. Do you have an advertising agency?
4. As I am collecting research on your industry over the next few days, are there any areas of special interest to you that I should research as well?
5. I'll have research and ideas ready for your review on (date). Can we schedule a short follow-up discussion on (date/time)?