



Prospective Client “Intake” Questionnaire

Digital Marketing Prospective Client Discovery Questionnaire

Brief Introduction

At NextGen Intelligent Marketing Solutions, we are very grateful for the dozens of new client inquiries we receive each month. Often prospective customers request a phone or our normal video conference meeting to begin. While we love getting to know marketers and business owners, usually starting with a cold phone meeting is not efficient for either one of us.

We are not your "normal" digital marketing solutions provider who just try to sell you our products, without regard for the results or needs of the client. Yellow page companies have done this for years and sadly enough, there are many digital solution providers doing the same old sales strategy. Your success means our success, so we have our Agile System in place for a reason. Most companies, the sales reps have quota's for the number of sales. Not ours, we "grade" our sales, digital planners, business development manager by the success of the client, however the client "defines" success for their company.

Digital marketing comes with dozens of challenges. One of your biggest has nothing to do with content strategy, SEO, building backlinks or even getting AI or a DSP involved. It comes much earlier in the process, and it's the foundation for all that follows. Of course, we are talking about on-boarding or what we call our AGILE system. Our Agile system consists of several phases - which you can see on our AGILE System page. We prefer the first phase is a prospective client signing up for our deep analytics first, then go onto this questionnaire. But at times, it isn't necessary.

Tailor-Made Campaigns/Projects Only

Our agency presentations/suggestions are tailored for each client. We utilize multiple experts for each project, depending on the client's goals, objectives and needs. For example, if your needs are for a SEO expert, CRO expert and a A.I. Developer, etc., that is whom we shall involve in your digital planning sessions, but not all companies are the same, so our tailor-made solutions are not the same either. We must understand more about an assignment first. It's hard to tell a business what NextGen IMS can do to help them if we don't have an clue of what we're trying to help them with.

It's not that we don't place a premium on relationship building—we certainly do. It's a matter of prioritizing our time on building relationships with businesses we're likely a good fit for. You see we're totally ready to invest, take the challenge and earn your account. We just don't want to take it on blind. In fact, with our proven AGILE system with our Phase 1 and then this Phase 2 - we find all of our clients are much more thrilled.

When we introduce ourselves to a prospect blind, the dynamic usually turns into some level of valuable consultation by way of NextGen IMS interviewing the business, sharing proprietary information about our agency, preliminary strategizing, providing perspective,

insights, etc. We invest our technology in the beginning, then we employ a digital and advertising planner and a customer success manager immediately, even before any sales presentation is compiled or any investment on your part is asked for. That is how we do business.

Gathering the Information

Before we meet more intimately, NextGen IMS routes most inbound leads to questions that comprise our “Discovery Intake Document.” It is preferable, to complete the Phase 1 or analytics stage first, before answering the questions in the “intake Questionnaire”, but not exactly necessary, but before we begin more intense discussions.

Our intake questionnaire is designed as a high-level screening. We want drill-down to the raw data that sheds light on a prospect’s strategic goals, KPIs (key performance indicators), products/services, competitors, existing digital marketing programs, projected media spend, social media background, SEO conditions, PR environment, content creation resources, local, domestic and international needs and design/build/develop prerequisites.

Our digital marketing strategy questionnaire serves more purposes than meet the eye. In reality, NextGen IMS is a pretty intense firm to work with. We hear other digital solution providers throw around words like “partner.” We say prove your willingness to work hard on your own marketing. If a business wants to work with an agency consultant at the level of NextGen IMS, they’ll need to pay attention, work, invest, and get skin in the game past money. We invest \$1000's in your business first - so our money is where our mouth is.

If all of this sounds like a company you would like to partner and work with, then we invite you to continue with the questionnaire. It is long, we know - but we leave no stone (or opportunity) unturned....

Thank you,

Brad Long

Brad Long

CEO

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Prospective Client Questionnaire

(Some questions might seem redundant, but please answer)

General Questions - Your Business

- 1. What inspired you to start your own business or work for your current employer?**
- 2. What products/services do you offer?**
- 3. What problems/value do you products/services offer people?**
- 4. How do your services/products differ from your competitors?**
- 5. What do you consider your USP is?**
- 6. How much growth have you experienced since you began?**
- 7. In last 6 months?**

8. In last 12 months?
9. When is your busiest day?
10. When is your least busiest day?
11. What are your current marketing (online and offline) efforts? Circle all that apply.

ONLINE MARKETING

- a. Website
- b. Organic SEO
- c. Local Search Marketing
- d. PPC
- e. Social Media Presence
 - i. Which ones?
- f. Social Media Advertising
- g. Display Advertising
 - i. Drive Web Traffic
 - ii. Drive Store (B&M) Traffic
 - iii. Drive Phone Calls
- h. Google Adwords
- i. Bing PPC
- j. Other SE PPC
- k. Social Reputation
- l. Site Retargeting (Remarketing)
- m. Search Retargeting
- n. Audience Targeting
- o. GeoFencing
- p. Video Marketing
- q. CRO
- r. Content Marketing
- s. PR Marketing
- t. Email Marketing
- u. Blogging
- v. Community Marketing
- w. Interactive Marketing
- x. Opt-Ins / List Building
- y. Listings
- z. Chatbots
- aa. AI

- bb. Old Fashion-WOM**
- cc. Wi-Fi in your place of business**
- dd. DSP Targeting**
- ee. Other**

Traditional Marketing

- 1. Yellow Pages**
- 2. Newspaper**
- 3. Billboard**
- 4. Radio**
- 5. TV**
- 6. Infomercials**
- 7. Magazines**
- 8. Sponsorship**
- 9. Trade Shows**
- 10. PR**

12. What is working the best? Out of all of your Internet Marketing & Traditional Marketing?

13. What isn't working?

14. How is your business performing currently and what expectations do you have from our SEO/digital marketing services?

15. What specific services are you looking for – Rankings, Conversion, traffic, branding the complete package, don't know?

- 16. Have you ever tried a similar kind of service before? If yes, then what made you quit or think about making a change?**

- 17. What percentage of total conversions are you getting from your website at the moment and what do you think should be the ideal percentage?**

- 18. What is your target audience and where and how do you think they usually spend their time online?**

- 19. What do you want your audience to do on the website – contact form filling, buy product, signup or more?**

- 20. What is the average life of a customer and how exactly does the customer cycle look like?**

- 21. What ideas do you have in mind in order to increase your current conversion rate?**

- 22. Every business has its highs and lows; how does the calendar work for your business?**

- 23. What other online marketing channels are you using at the moment?**

24. Can we have access to your Google analytics and Google Webmaster tools?
25. Can we use the company email address for outreach?
26. Are you in the process of making any change on your website?
27. Do you have website developers and designers in-house?
28. Do you have any content assets which they have created in the past and have not used some reason or the other?

29. Do you have the budget to invest on charity, sponsorship and contests?
30. What organizations and associations are you associated to?
31. Are you working with any mainstream and popular client?
32. Have you ever worked with any PR agency before?
33. Is your business directly or indirectly involved in any eco-friendly or non-profit work?

Product(s)/Service(s) & Competitors

1. What exactly do you offer (products/services offering) and how does it solve people's problems?

2. Describe key features of your product(s).

3. Who are your primary targeted audience/customers

4. Secondary?
5. Other verticals?
6. Who are your competitors?

7. Describe key differentiators from your competition.
8. What are your best markets and what is the reason for that?
9. Do you deal with any channel terms of services, legal or industry specific regulatory issues for public marketing?
10. What do you think makes your marketing assignment more tricky than most?
11. What makes your marketing slam-dunk easy?
12. Is there anything else you want us to know, big picture?

Strategy & KPIs - Part 1

Which of the following KPIs best represent your objectives, and in what order?

1. Direct Response [Leads/Sales/Both] CPA KPIs
2. Attributable [Leads/Sales/Both] CPA KPIs
3. Content Amplification (mid-funnel or deeper entry)
4. Community Building
5. SEO: Organic SERPs Brand Prominence
6. Event or Promotions
7. PR, Amplification KPIs
8. Site Traffic KPIs
9. Awareness KPIs
10. Other KPIs - please describe

Changes Sought

1. How do you want your program(s) to change?

2. Paid Search
3. SEO
4. Paid Social
5. Organic Social
6. Display

7. Retargeting
8. What is an acceptable cost per action (CPA) for each KPI?

Projected Media Spend

What is your current or anticipated monthly media budget?

1. \$0 – \$1,000
2. \$1,001- \$5,000
3. \$5001 - \$10,000
4. \$10,001 – \$25,000
5. \$25,001 – \$50,000
6. \$50,001 – \$100,000
7. \$100,001 – \$200,000
8. \$200,001 – \$300,000
9. More than \$300,001

Social Media Background

1. What social profiles do you currently maintain and who runs them? Please provide links to each.

2. Are you happy with the ROI of your social programs?

3. Do you currently run any of the following social amplification ads?
4. Facebook Ads
5. Feed
6. RH column
7. Mobile
8. Amplified page post
9. Pure external traffic-driving ad unit
10. Twitter
11. Promoted Tweets
12. Promoted Accounts
13. Retargeted Psychographics
14. YouTube TrueView Ads

SEO Condition

1. Do you believe you get the right amount of free traffic from Google for the authority of your site?

2. Describe you efforts on Bing and other SE?
3. Have you recently experienced a substantial drop in free traffic from Google?

4. Is this the main reason for your inquiry?
5. What are your theories regarding why?
6. When was the last time your website underwent an SEO audit?
7. What are the few basic keywords you ideally want to rank for?
8. Which competitors have a direct impact on market sales and how do you ideally want to beat them?
9. What have you done in the past with regards to SEO and digital marketing on your brand's website?
10. Are you working with any PR agency? What are they doing for you?
11. Do you do any offline marketing? If yes, what are its specifics and is there a chance of integrating it with online marketing?

Public Relations Environment

1. Please describe PR activities you currently undertake.
2. Social Amplification
3. Product Launches
4. Contributed Articles
5. White Papers
6. Press Releases
7. Webinars
8. Tradeshows
9. Public Speaking
10. Awards
11. Promoting Other Notable Corporate Milestones

Content Creation Resources

1. What goals do you have for content marketing?
2. Focused quality traffic to your website?
3. Attributable conversion?
4. SEO?
5. Links?
6. Social signals?
7. Friendship: likes, follows, etc.?
8. Tell us about your internal or third party content creation team.
9. In-House
10. Contractors
11. How much content do you create?
12. Does your business currently blog? If yes, what is the URL for your blog?
13. Does the content marketing team use research to advise content creation?
14. If yes, what data is used and who generates it?

International Needs

1. What countries and languages do you market in?
2. Do you seek multilingual, multinational expansion?
3. Do you have translation teams in place?
4. Are they local speakers?
5. In-house resources?

Site Design/Build/Develop Prerequisites

1. Is the new website based on existing designs? Or, will this be new design?
2. What will the primary purpose be for the site?
3. ___ Catalog?
4. ___ Lead Generation?
5. ___ Ecommerce?
6. ___ Informational ?
7. ___ Entertainment?
8. Do you have an internal development team? What are their roles?
9. Will your team provide the content?
10. Or will you need some content development support?

Tools Used

Please check which of the following tools you use: (Each category is in alphabetical order)

Ad Management

- ___ Acquisio
- ___ AdAlysis
- ___ AdRoll
- ___ AdStage
- ___ Adwords scripts
- ___ Criteo
- ___ DoubleClick
- ___ Kenshoo
- ___ Marin Software
- ___ Optimizely
- ___ The Trade Desk
- ___ Wordstream

Analytics

- ___ Bitly
- ___ Chartbeat
- ___ Google Analytics

- ___ **Google Search Console**
- ___ **Kiss Metrics**
- ___ **Moz Tools**
- ___ **Neustar**
- ___ **Optimine**
- ___ **Sysomos MAP**

Community Management

- ___ **Brandwatch**
- ___ **HootSuite**
- ___ **Radian6**
- ___ **Socialbakers**
- ___ **Socioboard**
- ___ **SproutSocial**
- ___ **Tweetdeck**

Competitive Intel

- ___ **Adgooroo**
- ___ **AdThena**
- ___ **ahrefs**
- ___ **Buzzsumo**
- ___ **SEM Rush**
- ___ **SpyFu**

CRM

- ___ **Highrise**
- ___ **Hubspot CRM**
- ___ **Infusionsoft**
- ___ **Insightly**
- ___ **Kaseya CRM**
- ___ **Marketing 360**
- ___ **Microsoft Dynamics**
- ___ **Netsuite**
- ___ **Oracle CRM**
- ___ **Pipedrive**
- ___ **Salesforce**
- ___ **SugarCRM**
- ___ **Zoho CRM**

DSP

- ___ AppNexus
- ___ BrightRoll
- ___ DoubleClick
- ___ MediaMath
- ___ Quantcast
- ___ TubeMogul

Email Marketing

- ___ ActiveCampaign
- ___ AWeber
- ___ ConstantContact
- ___ GetResponse
- ___ MailChimp

Marketing Automation

- ___ ActiveCampaign
- ___ Adobe Marketing Cloud
- ___ Eloqua
- ___ HubSpot
- ___ IBM Marketing Cloud
- ___ Marketo
- ___ OutMarket
- ___ Pardot
- ___ ShareSpring

Reporting

- ___ Buffer
- ___ DashThis
- ___ Datorama
- ___ Domo
- ___ Megalytic
- ___ Raven Tools
- ___ Simply Measured
- ___ SuperMetrics
- ___ Tableau
- ___ TapClick

Reputation Monitoring

- Grade.us**
- Rankur**
- Sysomos Heartbeat**
- Trackur**

SEO

- AWR Cloud**
- Botify**
- BrightEdge**
- Conductor**
- Google Keyword Planner**
- LinkResearchTools**
- Majestic SEO**
- OnPage.org**
- Screaming Frog**
- SearchMetrics**
- SEOMonitor**
- Yoast**

Tag Management

- Adobe DTM**
- Ensignen**
- Google Tag Manager**
- Signal**
- SuperTag**
- Tag Commander**
- Tealium**
- UberTags**

Administrative Questions

With whom will we review your current marketing plan?

Who has final say on decisions related to procedures, collateral, and implementation?

What are your goals?

What are the metrics by which we'll measure success?

Who will be our point(s) of contact for progress reports as the process unfolds?

- 1. What qualities and behaviors do you want to see in your agency team?**
- 2. What qualities and behaviors do you not want to see?**
- 3. What is not working about your current vendor relationship or in-house solution?**
- 4. What are common mistakes and misconceptions agencies make or have about your business and brand?**
- 5. Do you have a wish list of initiatives that are not part of this program but you would like to see come to fruition in the future?**
- 6. How do you measure the quality of your agency relationships?**
- 7. What are things you would like to see**
- 8. What is the most often you can meet with us for status and planning meetings?**
- 9. Do all the people in your company who need to know what we are doing understand what we are doing?**
- 10. Are there any training or informational seminars you would like us to give to different groups in your company (online media, search marketing, social media marketing, etc.)?**

Goals/Metrics-Part 2

- 11. What are your metrics for success? CPM, CTR, CPC, CPL, CPA, ROI, page views, engagement time, brand recognition?**
- 12. How about for social? Fans, followers, chatter, shares, social site traffic/leads/revenue, etc.?**

13. What is the most important action on your site? What is the least important action on your site?

14. What will make this campaign successful in your eyes? How about in your bosses' eyes? How about in your sales team's eyes?

15. Do you have any historical or current benchmarks for these metrics we can trend against? (Often, for example, a client is at a \$50 cost per action and they are hiring you to get it to \$25.)

16. Can you elaborate on things you have tried in the past? What worked well and why do you think it succeeded? What didn't work and why do you think it failed?

17. What is your average margin on a sale or what is your average cost of goods sold? What are the expenses that go into the cost of goods sold?

Tracking and Reporting

18. How do you currently measure ROI?

19. What tracking systems and social reporting systems are you using now?

20. Are you able to trace offline actions and sales (call center, retail, post-lead conversion) to online investments? If so, how?

21. Are there any security compliance regulations we should know about that will make it hard to get our tracking code onto your site? If there are, who should we start talking to now?

22. Are there any in-house reports or dashboards you will want our data integrated into? If so, can we see them so we can deliver data to you in the right format?

23. What can we provide you to help express your success within your company and promote the good work that you do?

Media

24. What media properties do you know you want to be in? Why?

25. What properties do you know you do not want to be in? Why?

26. What are your geographical constraints?

27. Are you asking for online value added placements with your offline media buys?

28. Do you have any proposals from media reps that contacted you directly?

29. Do you want to have a media day to meet with the reps of the larger properties we are buying on?

Social

30. Why would anyone want to be your friend? Why would they want to connect with you, listen to you, and share what you have to say?

31. What fears, compliance issues, and workflow issues are holding you back from doing more social media marketing?

32. Do you have a companion steady state social advertising budget?

33. What social properties do you have up and running?

34. How do you handle naming conventions, URL conventions, and management for various brands and regions throughout the world in order to avoid clutter?

35. How do you encourage your employees to produce great content that expresses your company's expertise, good corporate citizenship, and human side?

36. When you produce content, where do you centralize and archive it?

37. What are the internal and external sources of content around your industry? Staff experts, industry experts, blogs, media, government agencies, etc.?

38. Who is managing social now?

39. Can you describe your workflow and approval process related to your social publishing?

40. Do you have an internal training and policy on how employees talk about the company and brand on their social platforms?

41. How do you handle password management for all your social properties?

42. How do tweets, status updates, and other posts get created and approved?

43. Do you know what types of posts and content spark high levels of user engagement?

44. Do you have standard operating procedures and rapid response legal/customer service resources for moderation?

45. What are some of the bad things people might say about your product or brand and how do you address those issues in the real world?

46. How are you measuring success in social media now?

Audience

47. Who are your target customers broken down by product?

48. Do they have any seasonal or geographic buying patterns?

49. Please provide all the customer analysis data you can to us?

50. Who are your best customers and what do they have in common?

51. Who are your average customers?

52. Who are your worst customers?

53. What are common mistakes and misconceptions consumers make or have about your business, products, and brand?

Messaging/Offers

54. What are all the benefits of your products broken down by product and target audience? How do you help people?

55. What are all the offers you can realistically make to your different audiences broken down by audience and product? What can we give them right now?

56. What has worked and not worked in the past for a benefit and offer messaging standpoint?

57. Can we see all the creative (banners, search ads, email, and landing pages) you have ran in the last couple years? Do you have the results for these various executions?

58. Can we talk to your sales people about what closes a deal? Can we hear a pitch from your top sales person?

59. Do you mind if we secret shop your competitors and hear their pitch?

60. What makes you different from your competitors? Why are you better? Why was your product developed?