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MAKES YOU CURIOUS.

Client discovery template

Prepared for

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- **Business/Goals**

1. Please provide a brief description of your business

What is your vision? What is the background of your business. What do you do and what is your business model?

2. What are your current business & marketing goals?

Add quantitative commercial targets for customer acquisition, leads and sales growth or other KPIs?

3. What is your current business challenge?

What is your current business challenge regarding your customers, competition, sales and other factors on the market?

- **Products/Services**

4. Provide an overview of your company's product/service line and their distribution.

What are your most important products and/or services? What are your key selling points?

Where do you offer your product/services (offline stores, online shop, representatives)? Where does the majority of your revenue come from? What is your focus online?

5. Are your products/services affected by seasonality?

In which period of the year do sales of your services and products peak and why?

- **Customers/Target**

6. What are your typical customer groups or segment(s)?

*Try and provide a basic profile of your existing typical customer groups (e.g. **demographics** – age, sex, marital status, education, income, etc; **geographics** – location of the customer; **psychographics** – attitudes, values, lifestyles, and opinions).*

7. How do they purchase your products/services in terms of frequency and purchasing habits?

Try to briefly explain the behaviour of your customers - why do they buy, how often, which of their problems do your products or services solve, what is important to them when they decide to buy from you?

- **Competition**

8. Provide web addresses of your top direct competitors, place them in order beginning with the most threatening first.

9. Who are your direct/indirect competitors, ones you admire for their branding or online marketing approach (benchmark)?

- **Brand**

10. What is your brand's key message?

What is the key message on your brand level, one you would like to communicate to your target group/potential customers?

11. What are your core competitive differences (USP) or desired positioning?

Which arguments can prove your message? What do you offer that differs from your competition? What would be an emotional reason to buy your product?

12. Does the business have a philosophy, credo, motto or a mission statement?

e.g. Nike - slogan: just do it; messages: be active, be healthy, fast, etc.

- **Experience / Plans**

13. What types of digital marketing activities are you already doing or tried doing?

List activities that you are doing or tried (unsuccessfully), in-house or with another agency.

14. Provide a link of the website/landing page you will use for you campaigns.

Link of your website or a specific landing page for a specific product.

15. What social media channels do you already use?

16. Do you have your own email database (customers or prospects) and how big is it?

17. How do you measure success of your digital marketing activities?

What kind of KPIs do you use and what tools do you use to measure them?

18. What is your digital marketing budget?