



## DISCOVER SESSION: BASIC QUESTIONNAIRE TEMPLATES

### OVERVIEW/PERCEPTION:

- Please tell us a little about your business.
- If you could have customers describe how they feel about your business and service what would you like them to say?

### ENVIRONMENT:

- Who are your local competitors? How many in your close proximity?
- What is the main differentiator that sets you apart from local competitors?
- What is the main differentiator that sets your competition apart from you?
- What percentage of your business is attributed to your different services? More focused on one?

### CURRENT/PAST MARKETING:

- What are marketing efforts are you currently engaging in?
- How much of your business do you feel is attributed to your current marketing efforts?
- Is there any marketing avenue/messaging you've tried in the past that you found to be particularly effective in new client outreach?
- What are your marketing goals? (lead generation/general awareness, etc.) ☐
- Is there a particular call to action you would like to incorporate in any marketing?

### CLIENT DEMOGRAPHICS/HABITS:

- Could you describe the demographic makeup of your typical client? (Age, gender, income, education, location- all of Sacramento?, etc.)
- Is there any demographic that you aren't currently reaching, but would like to?
- How do customers currently make decisions regarding your service? Do you generally target parents?
- How does the typical person seeking your business find you?
- How do you re-engage with clients after they express interest? (i.e. requesting information, stopping by, calling in, etc.) Do you have a potential client email list?

- Do you currently offer any new client incentives?